Undergraduate Student Organizations Manual

A supplement to the *Indiana University Student Organizations Handbook*

Revised January 2009

KELLEY SCHOOL
OF BUSINESS
INDIANA UNIVERSITY

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◢ OVERVIEW

Student organizations are a critical component of the Kelley learning experience, giving students valuable opportunities to strengthen both leadership and teamwork skills. In addition, active membership in an organization exposes you to the values we at Kelley deem most important for your development into a young business professional: respect, responsibility, and ethical actions and decision-making.

This manual is designed as a supplement to the *Indiana University Student Organization Handbook*, available from the Office for Student Organizations and Leadership Development, IMU Room 371, or online at http://sao.indiana.edu. The intent of this manual is to help Kelley organizations understand and navigate the policies and procedures specific to the Kelley School, as well as certain University policies commonly encountered by Kelley organizations.

Support for Kelley student organizations is provided through the Undergraduate Program office. If you need assistance or have questions about this manual, please contact:

Jim Johnson, Assistant Director
Undergraduate Program (BU 234)
(812) 855-8066   jafjohns@indiana.edu

◢ REGISTRATION

Requirements

Organizations seeking registration as "Kelley School of Business" organizations must meet the following requirements:

- The organization must qualify for registration with the IU Office for Student Organizations and Leadership Development.
- The organization must obtain the endorsement of the relevant Kelley academic department chair or, for organizations with broad membership, the Chair of the Undergraduate Program.
- The organization must be advised by a Kelley faculty or staff advisor. Additional advisors are permitted.
- The organization must have a direct connection to Kelley or be of particular interest to business students. Organization members are not required to be business majors.

Organizations not meeting these requirements, or with broader campus appeal, may register with IU in a category other than "Kelley School of Business Organization."

Benefits and Privileges

In an effort to better promote Kelley student organizations to current and prospective students, to improve service, to facilitate communication, and to standardize procedures, the Undergraduate Program facilitates a process through which organizations may annually register to become listed Kelley organizations.

There are many benefits to becoming a registered Kelley student organization, including:

- Use of the "Kelley" name*
- Listing on the Undergraduate Program website with a link to your organization's website
- Access to relevant media for promoting meetings and events
- Representation in the Kelley Student Government, including the ability to apply for funding

- Invitations to participate in Kelley activity fairs and special events
- Access to promotional stands/stanchions through Building Support Services
- Access to promotional glass cases through Building Support Services (subject to availability)
- Ability to submit requests for external funding through the Office of Development
- Undergraduate Career Services recognition

* Please note that use of the Kelley name is a privilege; in order to retain this privilege, you must adhere to Kelley's branding standards.

Process

Registration is a multi-step process:

1. Upon initial registration, the organization must submit a letter of support from a Kelley academic department chair, or the Undergraduate Program Chair, endorsing the organization as a Kelley School of Business organization.
2. The organization must register each fall with the IU Office for Student Organizations and Leadership Development. Guidelines for registration, a description of benefits, and instructions are listed in the *Indiana University Student Organization Handbook* and on the website at http://sao.indiana.edu.
3. The organization must submit annually, by September 15, the Kelley School of Business Student Organization Registration Form, available at http://www.kelley.iu.edu/ugrad/life/organizations/. New organizations or those missing the initial deadline may submit the form after September 15. For annual renewals, a chair's endorsement letter is not required; however, the Undergraduate Program will consult with the chair regarding the organization's continued registration.

Approval of Kelley student organization registrations, including name approval, is at the discretion of the Undergraduate Program. New organizations with missions that duplicate or closely resemble the mission of existing organizations may be denied registration.

The campus registration should be updated and the Kelley registration re-submitted any time there is a change in the organization's leadership.

◢ ROOM RESERVATIONS

Any campus student organization may reserve rooms in the Kelley Undergraduate Business building for meetings and events. To reserve a room, organizations must first complete the Indoor Campus Event Registration Form and submit it to the Office for Student Organizations and Leadership Development. The form may be obtained at http://sao.indiana.edu/space_reservations.html. Commercial activity (i.e. corporate advertising, solicitation) is prohibited in the Business building. The event registration process should help organizations avoid engaging in prohibited commercial activities.

Once the event is approved, the organization will be directed to the appropriate office to complete the space reservation. For rooms BU 341A, 482, 732 and 736, the reservation is made through Becky Kehrberg at (812) 855-3297 or bkehrber@indiana.edu. Keys for these rooms are available from Building Support Services in BU 141. These rooms should remain locked when not in use.

All student organization events requiring food distribution are subject to approval by the Office for Student Organizations and Leadership Development and Department of Environmental Health and Safety. For events involving food, complete the Temporary Food Service Request Form at least 10 days before the event and return it to the Office for Student Organizations and Leadership Development for initial approval. The form will then be forward to EHS for final approval.

For additional information about room reservations and/or the Temporary Food Service Request Form, consult the *Indiana University Student Organization Handbook.*

◢ PUBLICITY

Bulletin Boards in Kelley

The posting of flyers on Kelley doors, walls, floors, pillars, and restroom stalls is prohibited. Signs posted in prohibited areas will be removed. Student organizations may promote membership or activities by posting information on any of the 30-40 "open" bulletin boards in Kelley classrooms and hallways. These are available to all student groups, one posting per board, preferably no larger than 8.5" X 11".

Chalking on the IU Campus

The campus policy on chalking can be found in the *Indiana University Student Organization Handbook*, online at http://sao.indiana.edu.

In accordance with campus policy, student organizations may chalk on concrete sidewalks, only in areas where the chalking can be washed away by rain. Areas where chalking is prohibited include covered entry areas, step faces, retaining walls, building walls, and benches. Waterproof and spray chalk are prohibited. Organizations using spray chalk, or chalking in prohibited areas, may be charged by the University for cleanup costs.

Table Reservations in Kelley

Any campus student organization may reserve table space near the first-floor Tenth Street entrance for promotional or fundraising purposes. Commercial activity is not allowed. To reserve a table, organizations must first complete the Indoor Campus Event Registration Form and submit it to the Office for Student Organizations and Leadership Development. The form may be obtained at http://sao.indiana.edu/space_reservations.html. Events involving food require completion of the Temporary Food Service Request Form as described above under "Room Reservations." Once the event is approved, Building Support Services can confirm table availability and complete the reservation. For more information, contact:

Marsha Marker, Building Support Services (BU 141)
(812) 855-4149   mamarker@indiana.edu

LCD Screen Announcements at Kelley

Registered Kelley organizations may run announcements about upcoming events or newsworthy information (awards, recognition, scholarships) on the LCD screens located on the first and second floor of the Kelley Undergraduate Business building.

Announcements should be formatted as Powerpoint slides and sent to kelleyannouncement@gmail.com. Due to software limitations on the screens, slides cannot have animation or video/audio components. When designing slides, keep in mind that text should be large enough to easily read from a distance. Whenever possible, include a contact email address and/or URL on the slide.

In your email, please indicate when you would like the slide to start running and the length of time it should be displayed. Allow 48 hours minimum for your slide to be posted; last minute requests are typically not granted.

Undergraduate Program staff reserve the right to make edits to slides in order to ensure readability and appropriateness of content.

Stanchions at Kelley

Stanchions, similar to t-stands, may be used for posting Kelley student organization information. A limited number of stanchions are available for student organization use from Building Support Services in BU 141. To reserve stanchions, contact:

Marsha Marker, Building Support Services (BU 141)
(812) 855-4149   mamarker@indiana.edu

Kelley Events Calendar

Submit your events for posting to the Kelley Undergraduate Program website by emailing details to kelleyannouncement@gmail.com. This will help all groups avoid scheduling conflicts, and it allows Kelley's marketing/communications staff to identify newsworthy events to cover in relevant Kelley and external publications.

Glass Cases

A limited number of glass display cases are available on the first floor of the Kelley Undergraduate Business building for student organization use.

To request a glass case, or to be put on the waiting list, contact:

> Marsha Marker, Building Support Services (BU 141)
> (812) 855-4149   mamarker@indiana.edu

To access an assigned case, a key may be obtained from Building Support Services in BU 141. Glass cases assigned to student organizations should contain current, relevant information about the student organizations. Content will be monitored periodically. Organizations not utilizing their assigned case, or failing to maintain current information, will have their case reassigned to another organization.

Organizations using glass cases should maintain them throughout the summer months. The building is utilized during the summer by current students, high school campers, and incoming freshmen attending orientation. Organizations without summer activities to promote should post relevant, current, general information about the organization.

UCSO Display Case

The Undergraduate Career Services Office has two display cases for exhibiting student and/or student organization achievements (i.e. case competition trophies, certificates, photos, Little 5 trophies, etc.). The cases are highly visible to recruiters visiting campus. All registered Kelley organizations are welcome to utilize the locked cases to display their achievements. The displays will be rotated based on the number of submissions received during the academic year.

To provide items for display, contact:

> Mark Brostoff, Associate Director, Student Services
> Undergraduate Career Services (P101)
> (812) 855-5317   mbrostof@indiana.edu

◢ IU NAME, LOGOS, AND WORDMARKS

Per the Student Organizations Handbook, "Student organizations may use Indiana University before the title or name of their group only if the organization receives money from the Committee for Fee Review, has been approved for listing on the Bursar's registration checklist, or upon approval by the Dean of Students." Most, if not all, organizations registered with Kelley would not qualify to use "Indiana University" or "IU" before their organizational name. You may, however, incorporate the phrase "at Indiana University" below your organizational name or elsewhere on print or electronic media.

Registered Kelley student organizations must also adhere to Indiana University's visual identity guidelines (visualidentity.iu.edu).

Block IU and IU Wordmark

Student organizations may not create their own logos that incorporate the trademarked block IU. Any text adjoined to a block IU is considered to be a wordmark, and only recognized academic units on the IU campus are permitted to use wordmarks.

Broad restrictions have also been placed on the general use of the block IU on websites, in print, and on apparel. Organizations must follow usage requirements carefully.

You may use the IU wordmark in the form of a "IU web branding bar" on your website (see visualidentity.iu.edu).

Printing Trademarked Symbols

To have the block IU, IU wordmark, or any other trademarked university symbol printed, you must get approval from IU's Office of Licensing and Trademarks (logo@indiana.edu) and use an approved vendor (see www.indiana.edu/~purchase/ for more information).

To make the approval process easier, Kelley student organizations should first consult with Kelley's Undergraduate Program. This is particularly important if your item includes any use of "Kelley" or "Kelley School of Business" (see next section).

◢ KELLEY NAME, WORDMARK, AND SIGNATURE

Kelley Name and Brand

Use of the Kelley name is a privilege, and all student organizations are expected to maintain the strong integrity of that name. The key attributes reflected in the Kelley name are outlined in the school's mission statement and Honor Code.

As a top-ranked school, Kelley has a vested interest in protecting its brand and ensuring the school is represented responsibly and fairly. Kelley values the superb work of student organizations and supports all groups in their endeavors to succeed. Faculty and staff do, however, expect students to adhere to guidelines and policies set forth by both Indiana University and the Kelley School of Business to guarantee the great reputation of both institutions is sustained.

Organizations should, at all times, strive to positively represent and promote the Kelley name. Any vulgar, obscene, or offensive representations of the Kelley name may, at the discretion of the Undergraduate Program, lead to sanctions. This might include, depending on the severity of the offense, prohibited use of the Kelley name, restrictions on attending recruitment fairs, and a freeze on access to advertising/promotional outlets within Kelley.

All groups registered with Kelley should indicate their affiliation with the school on their websites. This can be done in introductory text, in an "About Us" section, or by including "at Kelley School of Business" beneath your organizational name.

Kelley Wordmark and Signature

Student organizations **may not use** the Kelley wordmark or signature in any form or on any media (electronic or print). There are no exceptions to this policy. Per university guidelines, wordmarks and signatures can only be used by academic units.

The Kelley signature is printed on the front of this manual. The wordmark is essentially the signature without "Indiana University."

◢ WEBSITE PRESENCE

Hosting Site on IU or Kelley Server

Organizations registered with Kelley can request space on the school's server (www.kelley.iu.edu) to host their site. To request space on the Kelley server, contact Tech Services at ksbweb@indiana.edu.

If your particular organization is open to non-Kelley students at IU, you may consider requesting space on the IU server as outlined in the *Indiana University Student Organization Handbook*.

Kelley Website Templates for Organizations

Website templates are available for registered Kelley organizations. By utilizing these templates, your organization will essentially be adhering to both IU's visual identity guidelines and Kelley's branding standards. In order to use the templates, however, you must host your organizational site on the Kelley server.

To see an example of the template design, see the Kelley Student Government website at www.kelley.iu.edu/ksg.

The organizational templates have a neutral palette, so individual groups should establish their distinct visual identity through use of photographs/illustrations and original copy/text. The IU web branding bar (crimson header), left navigation, and white/tan backgrounds must stay intact. Stylings (fonts and spacing for headings, subheadings, and body text) should also be maintained whenever feasible. Your organization's banner will be provided when the templates are requested; you must use this provided banner and should not change the background color.

To request the templates, email Shawn Conner, Assistant Director of Undergraduate Marketing/Communications at Kelley, at shconner@indiana.edu. An in-person consultation is required before the templates will be emailed to your appointed technology representative. If your group wants to deviate from the established template's general design and stylings, you must get written permission (typically via email) to do so.

Kelley Name on Your Website

If you are a registered Kelley organization but opt to not utilize the aforementioned website templates, you should nevertheless clearly indicate your affiliation with Indiana University and the Kelley School of Business on your site. This can be done through introductory text on your homepage or in an "About Us" or other appropriate section of your site.

While the Undergraduate Program does not prohibit groups from hosting sites on a non-IU or non-Kelley server, groups whose names include "Kelley" must indicate their affiliation with the Kelley School of Business on their homepage. Failure to adhere to this policy will result in loss of the use of "Kelley" in the organization's name.

IU Web Branding Bar and Favicon

Organizations are encouraged to incorporate the official crimson IU web branding bar (header) and IU favicon on their websites. These are built into the Kelley organizational website template.

To add the bar and favicon to your existing website, see http://visualidentity.iu.edu/media/downloads.shtml.

Your site should be hosted on an IU or Kelley server if you choose to incorporate these trademarked items.

◢ FUNDING/FINANCES

Corporate Gifts

Many Kelley student organizations seek corporate or external financial support for their activities, and many have been successful in securing such support. The Kelley School wishes to foster relationships between our corporate partners and our undergraduate students. There are a number of guidelines in place to help facilitate gift solicitation, as well as stewardship and utilization of gift funds.

When a corporation sponsors an organization or its activities, that student organization is responsible for stewardship of their gifts. This means to thank the donor company, include them in any sponsored activity, and let them know that their funds are being used according to their wishes.

Solicitation

All efforts to solicit external funding from corporate donors must be coordinated with the Office of Development and Alumni Relations, CG 3080. External funding includes corporate support for case competitions (see also Case Competitions, below).

When organizations work with Development, Kelley as a whole is able to be more professional in its approach to solicitation, and is better able to account for contributions to our programs. In order for corporate donors to receive proper gift credit and to ensure their maximum tax benefits, gifts must be made to the IU Foundation through Development. Additionally, Development can help student organizations identify potential donors, improve their solicitation materials, and provide accurate information to donors about submitting gift funds. Finally, collaboration allows the Development staff to be better informed of student organization activities and needs, and creates the potential to incorporate those needs into larger gift requests the School may be developing.

Ways Kelley organizations may work with Development:

(1) Submit requests annually to the Office of Development Investment Options Guide.

- Each fall, the Office of Development publishes a booklet of giving opportunities to share with campus recruiters and prospective donors. The Guide, which may be updated mid-year, is also available online at www.kelley.iu.edu/development/cf_options_guide.cfm. Templates for submitting requests are distributed electronically to all registered organizations in the spring (for the fall publication) and should be submitted to Development by April 30 for inclusion in the fall publication.
- Submissions should outline your needs, as well as any benefits to the donor(s). Typically, corporate donors seek to gain access to good students, and to build their brand among the students. Opportunities to accomplish these goals will appeal to potential donors.
- Submissions to the Investment Options Guide should request support for a specific event, not general operational funds or money to purchase club shirts, etc.
- Submission of a request does not guarantee funding. However, the document does provide the Development staff with information about your organization and activities, allowing them to more effectively present your needs to potential donors and respond to donor inquiries.

(2) Contact Development to share specific details for needs not listed in Investment Options Guide.

(3) Share with Development lists of companies and contacts your organization would like to approach. They may have a better contact within a particular company, suggestions for other companies with similar interests, or pre-existing plans to solicit those companies for larger gifts to the School.

(4) Share copies of planned correspondence or solicitation materials to ensure consistency of message

(5) If a company contacts a student organization directly, inform the Office of Development of any arrangements made with the company. This will allow the Office of Development to ensure there are no conflicts, prepare a corporate payment request to send to the donor company, and prepare and send the tax form when the gift arrives.

For assistance with corporate solicitation, please contact:

> Amy Foster, Development and Alumni Relations (CG 3080)
> (812) 856-0189   aefoster@indiana.edu

Utilization of Gift Funds

Proper stewardship of gifts requires utilizing the gift for the intended purpose and within the intended time frame of use, typically within the same academic year. In addition:

• A thank you letter should be sent to the donor company. If the company is sponsoring a particular activity, an invitation should be extended to them to participate in that activity. If they have provided general support, please send a schedule of the organization's events and let the sponsor know of the various activities they are welcome to attend.
• Recognize your corporate sponsors on your student organization website and publicly thank them during any event which they sponsor.

To ensure proper gift credit for the donor, gifts to the School in support of student organization activities and events must be deposited with the IU Foundation. Gifts are deposited into an Undergraduate Program IU Foundation account. Student organizations receiving corporate gift support will be notified by the Office of Development and/or the Undergraduate program.

Utilization of gift funds in the Undergraduate Program account requires advance planning and coordination with the Undergraduate Program staff. Each situation is unique, and several steps or processes may be required to utilize any one gift.

The primary methods of utilizing gift funds include:

1. Units of Indiana University (IMU, RPS) may be able to bill the Undergraduate Program directly, or external vendors may be able to submit invoices directly to the Undergraduate Program for payment. In either case, the Undergraduate Program may need to establish a purchase order and request a "Hospitality Code" from the campus. When purchase orders and Hospitality Codes are needed, vendor estimates are required and paperwork must be submitted at least one week prior to the event.
2. In some cases, individuals may be reimbursed by the IU Foundation for expenses paid in support of the event or activity funded by the gift. Receipts, listing only items to be reimbursed, must be submitted to the undergraduate program office.
3. If other procedures are not feasible, gift funds may be transferred to the organization's Student Organization Account (SAO) to reimburse the organization for approved expenses. This is least-preferred option for utilizing gift funds.
4. If travel is involved, the organization must follow the travel guidelines outlined below.

To arrange the proper use of gift funds, please contact:

Jim Johnson, Assistant Director
Undergraduate Program (BU 234)
(812) 855-8066   jafjohns@indiana.edu

Undergraduate Student Organization Scholarship Awards

At the direction of the Dean, all scholarship funds awarded through Kelley must be processed by the Undergraduate Program Scholarship Manager. Below are the proper procedures through which an undergraduate scholarship, designated for a student organization, is to be awarded and the roles of each staff/faculty member and student leader involved. Any scholarships awarded or promised outside the parameters of this procedure, or without the involvement of the Scholarship Manager, will not be funded by the School or processed through the University.

Roles of involved parties:

- Office of Development and Alumni Relations – Development is charged with bringing the funds into the University. Development will serve as the contact to the donors and will ensure that donor intent is honored when awards are made. Development will notify the Scholarship Manager as well as the student organization when funding is received so both parties are aware that an award will need to be made.
- Undergraduate Program Scholarship Manager – The Scholarship Manager will know of the establishment of the award and will be the holder of the criteria for the award. The Scholarship Manager is ultimately responsible for the award being made, keeping donor intent in mind. The Scholarship Manager also processes and tracks all scholarship awards, ensuring that the students receive the scholarship funds. She or he will notify donors and other constituents of the recipients.
- Student Organization Representative – The student representative will be the liaison between the Scholarship Manager and the student organization. The student will serve as an information resource for the Scholarship Manager, providing information such as the student organization roster, application procedures (distribution and collection), and any other information the Scholarship Manager requires to properly make the award.
- Faculty Advisor to the Student Organization – The Faculty Advisor will serve as a 'back-up' resource to the student representative. If the Scholarship Manager has difficulty in securing information from the student representative, the Faculty Advisor will provide needed information to the Scholarship Manager. The Faculty Advisor also provides continuity and education for the organization, offering a historical perspective about the awards and ensuring that the student representative is aware of and following scholarship procedures.

Process for awarding Student Organization Awards:

- Funding is received in Office of Development
- Office of Development notifies Scholarship Manager and student representative that funding is received and provides the criteria established by the donor to Scholarship Manager.

- Scholarship Manager contacts the student representative to request the information required to make the award. When appropriate, Scholarship Manager may work with organization and/or Faculty Advisor to establish club's role and involvement in the application or selection process.
- Scholarship Manager makes the award at time period indicated on criteria form (i.e. Fall/Spring).
- Scholarship Manager notifies recipients that they have received scholarship, and also notifies student representative, Faculty Advisor, donor, and Office of Development.

The organization (including officers and/or the Faculty Advisor) should not select award recipients or promise funding to members unless specifically asked to do so by the Manager of Scholarships. Such financial obligations, if made, are solely the responsibility of the organization and will not be honored by the Kelley School.

For more information or questions about this policy, please contact:

Amy Foster, Development & Alumni Relations (CG 3080)
(812) 856-0189   aefoster@indiana.edu

OR

Missty Warren, Scholarship Manager
Undergraduate Program (BU 234)
(812) 855-4474   mibhicks@indiana.edu

Kelley Student Government Funding

Registered Kelley student organizations are represented in Kelley Student Government (KSG) by the organization president, beginning the semester following the organization's establishment. Responsibilities and expectations of KSG membership are outlined in the KSG Constitution (see http://www.kelley.iu.edu/ksg). One privilege of membership is the ability to apply for funding through KSG.

The Kelley School typically provides funding each year for use by student organizations to support programming and events that benefit students or the School. The process for disbursing this support has been delegated to the KSG, using the following procedures:

- Student Organization Presidents or their proxy must have attended at least two of the four club-focused meetings in a semester in order to be eligible to request funding that semester. Requests may be presented at the second meeting attended. Organizations represented in at least two fall meetings may present a funding request at the January meeting.
- The KSG President may limit the number of funding requests allowed at each meeting, based on available time.
- Organizations requesting support will make a presentation to the Government which outlines the program or event, anticipated costs, other available funding sources, and benefit to the School or student body. Organizations should provide copies of the proposal for the KSG members, and/or a Power Point presentation may be utilized.
- Organizations requesting support must have a Student Organization Account (SOA) into which the funds can be transferred. Information about Student Organization Accounts can be found at http://soa.indiana.edu/.
- Student Organization funding requests may be supported until available funding is exhausted. Unutilized funds will not carry forward to the following academic/fiscal year.
- The KSG advisor may facilitate the funding request process.

Other Funding Sources

Student organizations may seek financial support from sources other than corporate gifts and Kelley Student Government.

Two of the primary campus funding sources are:

IUSA Student Organization Funding Board (IUSA Aid)

- The Indiana University Student Association Funding Board meets weekly, at which time requests are presented, reviewed, and voted upon by the board.
- Any registered student organization that wishes to be eligible for funding from IUSA Aid must have attended an orientation session with Student Organizations and Leadership Development. For information on make-up orientation sessions, please email sao@indiana.edu.
- For guidelines, application procedures, or more information consult the Indiana University Student Organization Handbook or contact iusaaid@indiana.edu.

Indiana Student Foundation Metz Grant

- Funding for the Metz Grant Program comes from the Arthur R. Metz Philanthropic Opportunity Fund and is administered through the IUSF Scholarships and Service Committee. The Metz Grant Program will annually award $50,000 in grant money; $25,000 in the fall and $25,000 in the spring.
- Applicants must demonstrate a need for financial support for a philanthropic cause.
- Additional information, application materials, and deadlines are available at http://iusf.indiana.edu/metz/index.html.

◢ CASE COMPETITIONS

There are an ever-increasing number of case competitions within the Kelley School, many of them organized and sponsored by student organizations. Any case competition funding solicited from corporate donors must involve coordination with the Office of Development and Alumni Relations, as outlined in the Corporate Gifts section, above. Operational or prize funds received from a corporate donor must be deposited with the IU Foundation.

Indiana University designates case competition monetary awards as "prizes," which must be paid to students via paper checks (or direct deposit) instead of through student Bursar accounts. To allow IU to process prize payments via checks, recipients must complete certain IRS forms. Students cannot receive award funds until after the required forms are received. Please note that the IRS form used will differ depending upon whether the student is international (W8-BEN) or domestic (W9). The correct IRS forms are available on the Kelley Business Office website, http://www.kelley.iu.edu/business/. The Undergraduate Program can provide a sample cover letter which may be given to participants with the forms and which explains their purpose.

It is the case competition coordinator or faculty advisor's responsibility to ensure that forms are collected before the conclusion of the competition. Collection of the forms may be done prior to the competition or on the day of the competition, but participants should be given a specific submission deadline (e.g., two weeks from the date of notification) to ensure that awards can be processed in a timely manner.

As the forms are collected they should be submitted to Janelle Martin in the Business Office, CG 3023. Because the forms contain student social security numbers, federal law requires that they be stored in a secure location (e.g., locked in a filing cabinet) while they are in your possession. The Undergraduate Program encourages organization advisors to facilitate this process.

Winners should be notified of their selection in writing. Copies of the notification, including recipient names, ID numbers, and award amounts, should be forwarded to Janelle Martin in the Business Office (martinja@indiana.edu). Please also copy Missty Warren, Scholarship Manager (mibhicks@indiana.edu). Ms. Martin will retain copies of the notification letters/emails for audit purposes.

Once Janelle Martin has received each recipient's IRS form and knows the amount of his or her award, she will begin processing payment of the awards via the disbursement voucher (DV) process. The DV process involves multiple steps and may take two-three weeks. Ms. Martin may be able to answer questions about the timing of fund disbursement, although she has no control over the process itself. Checks will be sent to the address each recipient provides on his or her IRS form.

Award recipients will receive an IRS 1099 form from IU at the end of the year. It will be the student's responsibility to determine whether any portion of his or her award is taxable.

Questions about this process should be directed to:

Kim Crider, Business Manager
Business Office (CG 3023)
(812) 855-2789   kcrider@indiana.edu

OR

Missty Warren, Scholarship Manager
Undergraduate Program (BU 234)
(812) 855-4474   mibhicks@indiana.edu

▲ TRAVEL

Liability

The University does not provide liability coverage for student travel. All students traveling as representatives of the Kelley School must sign an "Assumption of Risk and Release from Liability" form, regardless of who pays for the trip. Students must completed and sign a separate form for each trip taken. The form must be completed at the time travel arrangements are made, and retained within the department or program office sponsoring the organization or arranging the travel.

The release form can be found under Travel, on the Business Office website at www.kelley.iu.edu/Business/.

Transportation

Vehicle rental

Students who are members of a recognized student group may use a university vehicle for approved travel. (See "Use of University Owned Vehicles" and related approval forms in the Auto section of http://rmweb.indiana.edu/orm/SiteMap2.cfm) Any University traveler must be approved by Risk Management in order to rent a vehicle for University purposes. To be approved each traveler must fill out the Authorization Form for Motor Vehicle Records Check online via IU's Risk Management website, https://rmweb.indiana.edu/orm/secure/MVR/FirstStepSubmit.cfm.

Groups of six or more students must be accompanied by an Approved University Employee. A student group requiring more than four vehicles for a trip must arrange for alternative means of transportation OR apply for an exemption of this rule from the Motor Pool and the Office of Risk Management. IU does not allow the use of 12- or 15-passenger vans.

Vehicle reservations may be made through the Travel Management Services website at www.indiana.edu/~travel/. Select the Online Enterprise Campus Rental link. Vehicle rentals may be charged to SOA.

For additional information about vehicle rental, contact the Office for Student Organizations and Leadership Development, Office of Risk Management, or Travel Management Services.

Vehicle charter

Student organizations or groups chartering buses using corporate gift funds or University funds must follow University travel and purchasing procedures. Student organizations planning to use gift or School funds for vehicle charter must secure a written cost estimate from the vender (Bloomington Shuttle, Star of America, etc.). Based on the estimate, a Purchase Order must be established prior to the date of service.

Once the Purchase Order has been established, the charter company will draft a contract for service. All contracts committing University funds, including contracts for transportation, must be reviewed and signed by the Indiana University Purchasing Department. Purchasing will return a signed copy of the contract to the vendor. When the vendor submits the invoice, purchasing will issue payment form the account listed on the purchase order.

For assistance with this process, contact the support staff member responsible for travel within the appropriate department, or contact:

> Teresa Hayden
> Business Office (CG 3023)
> (812) 855-6834   tahayden@indiana.edu

www.kelley.iu.edu/ugrad