MBA Program
New Student Leader Handbook

To view online, please see at student.net under “Enriching your Experience”

December 1, 2011
12:30 - 1:30 p.m.
1213 Gallagher Hall
Agenda

**Part I – December 1, 2011**

- Welcome & Introductions .................................................. Jim Stevens
- Club Funding ...................................................................... Matt Gallegly
- Finances & Reimbursements .............................................. Steven Escobar
- Academic & Student Services Overview ........................... Becky Heard
- Event Planning .................................................................... Becky Heard
- Professional Development Resources ............................. Chris Ditto

**Part II – January 17, 2012**

- Website Standards, GSM/UCD Logos & Marketing .......... Tim Akin
- Alumni & Business Partnership Resources ...................... Roberta Kuhlman
- Fundraising Information .................................................... Judy Nagai
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<tr>
<th>Staff Resources</th>
<th>Student Affairs</th>
<th>Staff Assistance</th>
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<tbody>
<tr>
<td>Becky Heard</td>
<td>(Academic &amp; Student Services)</td>
<td>Can assist with questions about planning events, supplies, facilities, and other GSM resources. Clubs can also purchase small speaker gifts and parking permits.</td>
</tr>
<tr>
<td>Chris Ditto</td>
<td>(Career Development)</td>
<td>Excellent resources for industry connections and recommendations for speakers and other alumni and corporate connections.</td>
</tr>
<tr>
<td>Inger Maher</td>
<td>(Career Development)</td>
<td>An additional resource for club events and related-event requests as well as supplies.</td>
</tr>
<tr>
<td>Lisa Raj</td>
<td>(Career Development)</td>
<td>Your contact for alumni resources: guest speakers, etc. as well as the contact for the GSM Business Partnership Program. Needs information on alumni volunteerism and requests you’ve made to alumni to participate in your clubs.</td>
</tr>
<tr>
<td>Roberta Kuhlman</td>
<td>(Alumni and Business Partner Relations)</td>
<td>See Judy prior to starting your fundraising campaign for assistance and guidance in all matters related to fundraising.</td>
</tr>
<tr>
<td>Judy Nagai</td>
<td>(Fundraising)</td>
<td>Run proofs of all printed materials past TA for edits and suggestions. Check with him for any GSM/UCD-related marketing.</td>
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<tr>
<td>Tim Akin</td>
<td>(Marketing)</td>
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12/1/2011
<table>
<thead>
<tr>
<th>Name</th>
<th>Office</th>
<th>Building/Office</th>
<th>Contact Information</th>
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</table>
| Steven Escobar    | GSM Business Office | Building/office keys | Room 2306  
|                   |                     | Reimbursements   | (530) 754-8953  
|                   |                     |                 | saescobar@ucdavis.edu                   |
| Michele Goodman   | GSM Business Office | Reimbursements   | Room 2302  
|                   |                     |                 | (530) 752-8878  
|                   |                     |                 | mlgoodman@ucdavis.edu                   |
| Nicole Starsinic  | Center for         | Big Bang! Events/Advising | (530) 574-6531  
|                   | Entrepreneurship    |                 | nstarsinic@ucdavis.edu                   |
Club Funding

Funding Information:
- Each official ASM club receives $200 per quarter and $600 per year. In addition, ASM clubs are eligible to apply for additional project funding out of an ASM club project fund. All ASM funding is provided through ASM membership fees as well as alumni donations to the Annual Fund.
- ASM budgets a minimum of $200 per club for club projects in excess of their original funding. This money is earmarked specifically for clubs.
- Additional funding for clubs is assigned based on availability of funds and purpose.
- All ASM funds given to clubs must be “reasonably” used for club events.
- A minimum of one event must be held each quarter to receive funding. Funds may not be rolled over from quarter to quarter.
- Annual club funding shall be allocated on a quarterly basis (Fall, Winter and Spring). Only 1/3 of the approved $600 funding may be allocated each quarter.
- In the event that a club needs full allocation immediately, a document outlining pre-scheduled events is required to be submitted to the ASM for review and approval.

Requesting Reimbursements:
- Complete a check request form
  - [https://sites.google.com/site/ucdasm/files](https://sites.google.com/site/ucdasm/files)
  - Submit to the ASM Director of Finance.

Special Funding Requests:
- Requests beyond the additional $600 require special approval and are limited by funds available.
- Submit a brief proposal (1-2 pages) to ASM using the supplemental funds form.
  - ([http://asm.gsm.ucdavis.edu/forms/supplementalfundsform.pdf](http://asm.gsm.ucdavis.edu/forms/supplementalfundsform.pdf))
- The ASM suggests you submit the form as early as possible to ensure availability of funds. If you are uncertain of the amount of funds you need, that can be taken into consideration.
- A response to your submission is provided in 1-2 weeks. If you would like to attend the ASM meeting in which the proposal is to be considered, speak to the Director of Finance or the VP and Director of Student Affairs to be notified of the date for discussion.
- A club should make no more than three requests per year for additional funding.

Fundraising:
- Please refer to Fundraising section of this document on page 23.
The Center for Student Involvement

The Center for Student Involvement is the campus department through which groups officially register as a student organization at UC Davis. Their mission is to help groups operate successfully on campus and to support the educational experience which organizations provide for student members - as well as the entire campus community. The ASM is registered with CSI on campus.

For further information please visit the CSI website:  http://csi.ucdavis.edu/orientation/index.cfm

CSI Can Help Your Group:

The director and program coordinators of CSI are all experienced program consultants and administrators. They have extensive knowledge about students, organizations, and co-curricular activities, event planning, campus and community resources, and campus, local, state, and federal policies and procedures. In addition, CSI can provide you with information, guidance, services, and support with the following:

• Registration of your group
• Fundraising: what it is, how, when, and where you may do it
• Club Finance Council and other funding sources for your group
• Campus Cinema
• Leadership development and team building for officers and members
• Group problem solving and conflict resolution
• Participation in the annual Activities Fair
• Campus awards for individuals and groups
• Other applications and deadlines
• Scheduling of appointments with program coordinators
• Mailboxes and storage space
• Financial accounts and EIN forms to obtain a banking ID number
• Campus Cinema Film Assignment program
• Other campus resources
Student Affairs

Communication:
- Suite 1101 is your one-stop shopping for the majority of your student questions and resources. We’re here to assist you and we like to see you.
- If you have a question and you can’t stop by, please send an email to Becky. She can answer most questions, or direct you to the right resource: bjheard@ucdavis.edu or (530) 752-3593-office
- The bi-weekly eNewsletter is our main source of providing information to students.
  SUBMISSIONS: http://students.gsm.ucdavis.edu/SA/enewsletter.htm
  PHOTOS: enewsletter@gsm.ucdavis.edu
  i. Let’s utilize the resource.
  ii. Reduce the number of mass emails.
  iii. Submit all club events and information (rather than stand-alone announcements).
  iv. Plan club events with enough notice so there’s no need for stand-alone emails.

Calendar:
- EMS: Check the online calendaring system and the academic calendar. Keep the calendar current.
- Post club events on club websites – maintain and keep current.
- EMS Tutorial available on line: http://ems.gsm.ucdavis.edu/virtualems/TrainingResources.aspx
- All clubs are linked to from the ASM website: http://asm.gsm.ucdavis.edu
- Please check the alumni calendar located at: http://gsm.ucdavis.edu/event-calendar-0, for any potential event conflicts.

Resources:
- Student Affairs provides supplies such as: post-its, pens, paper clips, stapler/staples, scissors, binder clips, and rubber bands to students. These supplies are available in the lounge and the computer lab. Email Becky if supplies are needed.
- Please return those items to their locations.
- We supply dry erase markers for student meeting rooms.

Facilities & Reservations:
- Composting: Please help maintain the composting bin in the student lounge. At the conclusion of your events, please remove composting and replace with a new bag. Cardboard can be recycled behind the Conference Center.
- Building repairs and/or maintenance: let Kathy Gleed know.
- Room Reservations: See EMS above for GSM facilities and refer to Event Planning section for other campus reservations.
**Club Office & Conference Room**

The club office and conference room is #2110. At the beginning of Winter Quarter, a representative from each club will be notified to pick up their key from the business office (Steven Escobar), Room #2306. You will need to return the club key to the business office at the end of your term in Fall Quarter.

Per UC Davis policy, no alcoholic beverages can be stored on campus – that includes the Club Office and Conference Room.

**Club Computer**

Each club has access to the club computer. Receive your password from your current club leader or IT/Communications contact.

**Other Helpful Information:**

- **Risk Management – Insurance**
  - All out of state, out of country travel must be preregistered with the University for University coverage to take effect. Registration requires completing a short form available at: [http://www.uctravel.org](http://www.uctravel.org)
  - Off-campus GSM events are only covered by insurance if the event is UC Sponsored and UC Supervised (attended by a faculty and/or staff member). Off campus club events are not automatically covered by insurance, but in many cases it is possible for clubs to obtain an insurance rider for a specific event.
Planning Your GSM Club Events

Event Checklist

Pre-Event
- Determine the following:
  - WHO is invited to event
  - WHAT type of event (reception, meeting, social)
  - WHEN is the event (date, time)
  - WHERE will the event be held (location)
  - WHAT is the budget for the event
  - WHO will collect & track RSVPs & where will people respond to
  - WHO is responsible for additional tasks
- Check school calendar (EMS) for potential conflicts and to see what rooms are available at the GSM.
  - If booking a room at the GSM, or another venue, book using EMS system.
  - If booking a room on campus, go to the CEVS website:  www.cevs.ucdavis.edu
  - If the Dean is requested, check his availability with his assistant

Making General Event Arrangements
- Send confirmation letter/email to speaker w/ the following:
  - Event date
  - Event time
  - Location of event
  - Length of presentation
  - Request AV set up needs (are we providing projector/laptop) etc.
  - Other pertinent info
  - Directions/map & parking permit
- Submit event information  http://students.gsm.ucdavis.edu/Forms/enewsletter.htm to the GSM student newsletters with as much information available as possible, including:
  - Name of event
  - Date
  - Time
  - Location
  - Other pertinent details
  - Where to respond along with RSVP deadline
  - Map/directions & parking information
- Marketing your event to external audiences (see Marketing & Communications Information)
  - To send invites to GSM Alumni or Business Partners, contact Roberta Kuhlman
  - To send invites to Dean’s Advisory Council members contact Judy Nagai
- Place an order for food & beverages & follow up with final guest count (let caterer know if event is zero waste)
You can self-cater small events on campus (To get reimbursed give original receipts & list attendees to ASM Finance Director)

- If the event is on campus & you are not self-catering, you must use an approved caterer off the CEVS website
- If the event is off campus, you can use the caterer of your choice unless the venue has restrictions.
  - All contracts need to go to GSM business office – you cannot sign contracts

- If serving alcohol on campus you must fill out alcohol permit from CEVS website (at least 10 days before event)
  - Events w/ alcohol must begin after 5 pm M-F or after noon on Sat
  - Alcohol service must not exceed 4 hours & not exceed 1 drink/person/hour & assume only 70% people will drink
  - Must have non-alcoholic drinks & food available at event
  - Must arrange for Cal Aggie Host – email Ben McNulty (bjmcnulty@ucdavis.edu) at least 2 weeks prior to event

- Contact facility to arrange for any AV needs as well as room set up
  - Any equipment that the facility cannot provide, can be provided by campus Media Works (530-752-2133). Reserve in advance.

- Buy gift/thank you card for speaker at bookstore or check inventory with student affairs.
- Request a parking permit (for club events only) for speaker from Becky Heard
- Call TAPS (530-752-TAPS) if specific parking requests or issues are relevant.
- Collect & track RSVPs
  - Get their first name, last name, organization & email address
- Send email reminder to all those who rsvp’d to event reminding them to attend & include parking/directional information
- Determine if speaker requires internet access during their campus visit. If so, complete the online request for temporary access at: Setting up guest internet access: [http://wireless.ucdavis.edu/guestaccess.cfm](http://wireless.ucdavis.edu/guestaccess.cfm)
- Print nametags, RSVP list & tent cards (if necessary). Make sure that GSM alumni are identified on printed nametags (e.g. Joe Smith ‘99 or Joe Smith MBA ‘99)
- Contact campus facilities management if you need zero waste set up & removal, extra trash pickup or cleaning of a room - send email to om-customers@ad3.ucdavis.edu
- Contact Steven Escobar at the GSM if you need the doors to Gallagher Hall open beyond normal business hours: saescobar@ucdavis.edu
- Arrange for trash pickup (if event is on the weekend) from UCD Facilities: om-customers@ad3.ucdavis.edu
Event Set Up (allow two hours for large events and one hour for smaller events)

- Prepare nametags
- Have parking permits available for speaker
- Set up registration table (nametags – printed & blank, RSVP list, pens for nametags)
- Make sure room is set up properly (chairs, podium, screen, catering tables)
- Test AV and show speaker how to work any AV
- Place water and speaker gift at podium
- Present speaker w/ thank you gift at conclusion of event

Post-Event

- Send thank you note to any speakers
- Turn in expense reimbursements & prepare a final expense sheet
- Fill out event summary with suggestions for future for club files
QUICK TIPS FOR A MORE “GREEN” EVENT

- Use materials that are compostable*, recyclable, or reusable
- Ensure recycling and compost bins are well marked and announce their location
- Turn off the lights when you leave
- Use natural lighting when possible – keep half the lights off during daytime events
- Use electronic documents instead of handouts
- Use windows for ventilation instead of A/C or heating system, when applicable
- Turn off the A/C or heating system when you leave and/or close windows
- Encourage people to walk, bike, carpool, or take public transport to the event
- Plan snacks that are not individually packaged and avoid individual condiment packages
- Send out event evaluations by Survey Monkey or other electronic sources
- Provide water in pitchers instead of individual bottles
- Don’t oversupply items at the event

*Composting is possible at events near the GSM. If you are not using R4 for your event, then the GSM provides composting bags in the student lounge cabinets. Bring the bag to your event and have participants place their compost waste in the bag. When the event is finished, walk the bag to the compost waste bins located behind the conference center next door.

UC Davis Waste Diversion Goals – Zero Waste by 2020!
Career Development:

- Career Development is located in Gallagher Hall Suite 1101.
  - The Career Development Coordinator works between the hours of 8:00 - 12:00 and 1:00 - 5:00. There are also Student Assistants on-site who support the Career Development Staff with various projects. The Center is staffed to assist students, recruiters, and to provide resources.
  - The Career Development Handbook which contains the Policy & Procedures for utilizing Career Services is published on our website

  - MBA Accelerator is the Career Development software utilized by staff, students and recruiters. It is a tool for student leaders and club officers to post events, and collect RSVP's. Career Development strongly encourages the use of the MBA Accelerator when Daytime or WP students are expected to attend an event. Simply send your event information to careerdevelopment@gsm.ucdavis.edu and staff or student assistants will post your events to the calendar, and will provide you with a RSVP list of names for your events. Career Development realizes that EMS is currently the Master Calendar for the GSM, but strongly encourages the ASM and clubs also to post events to Career Accelerator (powered by Symplicity), as we would like to avoid time conflicts whenever possible.

- The weekly Career Development newsletter is sent to all Daytime students and Working Professional students in Sacramento and the Bay Area. The newsletter is then archived and made available to our alumni population.
  - Student Leaders and Officers are encouraged to submit announcements, articles, and information regarding external events to the careerdevelopment@gsm.ucdavis.edu mailbox by Wednesday to be included in the upcoming Friday newsletter.
  - Student Leaders and Officers are asked to support the newsletter by utilizing and leveraging its circulation.
Assistance and Administrative Support from Career Development:

- Career Development is eager to help you identify alumni, employers, recruiters and any other external professionals we consider GSM partners to speak individually with students about their company and professional experience, or to participate on panels and attend functions.
- Career Development expects the same level of professionalism, outlined previously, when contacting any of our external GSM partners.
  - Let us know which alumni are helping you.
  - Thank alumni and other partners for their involvement.
- The Career Development staff works with leaders and officers to co-sponsor events and/or assist with GSM-related events in the following ways and according to the guidelines already included in this handbook:
  - Guest Speakers and Panel identification
  - Producing Posters, Programs & Promotion (need realistic turnaround time, 3 days)
  - Parking Permits
  - Reservations and Catering Orders
  - Small budget available for beverages, refreshments, approved travel to company sites, and small gifts

Creating a Collaborative Culture:

- Student leaders and officers have a unique opportunity to create and build a positive collaborative culture at the GSM. You’re in a position to inspire the next group of officers and the next graduating class. Career Development asks for your assistance in creating a culture of collaboration, participation and professionalism. We appreciate your assistance in raising awareness of the GSM, and creating a positive reputation to all of our external partners. In turn, this adds value to your UC Davis MBA.
Marketing and Communication Information

Our Development and External Relations team are happy to advise your club/organization on how best to market and communicate events, activities, and other news to the greater GSM community. Here are some tips and guidelines on logo use, promotions and spreading the word.

UC Davis Graduate School of Management Logo Use:

- The GSM’s official logo contains the UC DAVIS word mark, which is trademarked and property of UC Regents.

- The GSM has been “deputized” to oversee the use of the GSM logo use by student groups. To meet campus requirements, we have developed a “GSM affiliate logo” that can be approved for use by official student groups:

![UC Davis Graduate School of Management Logo](image)

- If you use this logo on your club Web site, this disclaimer must appear. It can be discreet:

  UC Davis makes no warranties, either expressed or implied, concerning the accuracy, completeness, reliability or suitability of the information contained on these Web pages or of the security or privacy of any information collected by these Web pages. All views expressed in this Web site are those of the author and not UC Davis.

  UC Davis logo used by permission.

- These limitations are established, in part, due to risk management issues involving student club activities as well as a need to control the use of official Campus logo, its trademark, and the brand value that extend from them.

- Please contact Assistant Dean of Student Affairs James Steven or Sr. Director of Marketing and Communications Tim Akin for permission to use and obtain the logo above in various formats: jpg, eps, tif, pdf and gif, in both color and black and white. We ask that you not manipulate the logo in any further way.
Use of UC Davis Name and Trademarks:

All variances of names and visual representations of the University of California, Davis, are considered UC Davis trademarks.

The marks include any trademark, service mark, name, logo, insignia, seal, design, or other symbol or device associated with or referring to UC Davis. Also included are any words, phrase, or image that implies association with the University, such as “Cal Aggie” or “Go Ags!” The University owns these trademarks and must approve their use.

- Groups are not permitted to use the University seal or “Cal Aggie” logo.

- Student organizations may use the University name (including any abbreviation) only to describe its location, but not as part of its name. Example: “Social Club at UC Davis” is permitted, but “UC Davis Social Club” is not permitted. Examples of proper use: Davis Net Impact, Wine Consulting Group at UC Davis.

- Student organizations may use the term “Aggie” as part of a name, but not “Cal Aggie.” Example: “Aggie Cultural Association” is permitted, but Cal Aggie Cultural Association” is not permitted. [If the name of your group is the same as, or very similar to, that of another group (campus or off campus), then you must clearly differentiate your group’s name. Terms that may help you differentiate your name include “at UC Davis” or “Campus Chapter of.” Examples: Campus NOW, Campus Chapter of Girl Scouts.]

Anyone violating the provisions of California Education Code 92000, which prohibit use of the University name without permission, is guilty of a misdemeanor. We urge groups to review all publicity materials used in any event they sponsor to insure accurate representation. Since individuals may be misled into thinking the University is associated with an event that uses its name, the University is exposed to potential liability should someone suffer damage or injury at the event. The University will seek indemnification from groups for any damages it may suffer as a result of unauthorized use of the University’s name.

Press Releases/Media Publicity:

- Official campus media relations are handled by UC Davis News Service.

- All press releases are approved and distributed through News Service.

- GSM collaborates with News Service press releases + posts release on BusinessWire.

- News Service and GSM fields media inquiries, and on many occasions we may seek and ask students to speak to the media as representatives of the School and the University.

- For questions, contact Tim Akin, 530-752-7362, tmakin@ucdavis.edu
### Marketing Channels/Innovator Magazine/Web/Social Networks:

- We are happy to help with student event/club marketing and avenues to promote such efforts (including Alumni Accelerator monthly e-news, Innovator magazine, etc.).

- Always open to story ideas, submissions and student-written articles for consideration for the Innovator magazine, and the GSM website.

- GSM Facebook page and Twitter accounts are other avenues for promotion, as is the GSM’s LinkedIn Group (can post event announcements, news, etc.). See Tim Akin or Lindsay Hardy about these channels.

- We encourage student groups to establish their own websites and social media channels. Please ensure that your club website adheres to the standards of the University to be linked to the GSM main website. Please follow the guidelines above for use of the UC name.

- **Please ensure your club website is up to date.** Club sites are frequently visited by prospective students as well as the general public. This is one of the first places sponsors go to check on a group to see if it is an organization they want to support, donate to, or help in any way. A professional, updated site with current contact information is important.

### Marketing Student Events/Programs to External Constituents:

- Invitations/announcements to our external constituents (Alumni, Business Partners, Dean’s Advisory Council members, etc.) must be reviewed and approved by Development and External Relations. Tim Akin/Marianne Skoczek can proof and offer suggestions.

  - Development and External Relations will consider stand-alone e-mail/printed mail from clubs/organizations to our internal and external constituents—including faculty, staff, alumni, Business Partners, Dean’s Advisory Council members, corporate recruiters, etc.—on a case-by-case basis. More likely, we would include such announcements in monthly e-newsletters.

  - **We recommend planning to invite at least 6 weeks before an event to allow timely inclusion in monthly newsletters**

- UC Davis GSM-branded template paper, invitations, envelopes, etc. can only be used when the event/program is officially co-hosted/presented/sponsored by the School.

### Photography/Videography/Digital Image Library:

- Photo shoots by professional freelancer = $1.50/hr.
- We are happy to share specific images from our digital photo library for promoting clubs.

- Videotaping an event/other with broadcast quality production using campus Mediaworks runs about $800 for singles camera, $1,000 with two cameras. This high-quality, professional taping allows the tapes to be edited and broadcast by UCTV, the University of California’s TV channel, which is carried on DISH Network and cable networks.
MARCOM CHECK LIST

√ See James Stevens or Tim Akin about use of GSM affiliate logo and required disclaimer on club Web site.

√ Club name must follow CSI (Center for Student Involvement) guidelines for use of UC Davis as location (Davis Net Impact = good. UC Davis Net Impact = bad. Biobusiness Club at UC Davis = good. UC Davis Biobusiness Club = bad)

√ Take advantage of GSM and UC Davis marketing and communications channels to internal and external audiences – web, social media, print, etc. – to promote club and events. See Tim Akin for more information and ideas.

√ Keep club website up to date and reflective of professionalism and the reputation of the UC Davis Graduate School of Management.

√ If you believe your club or activity is newsworthy and you want to reach out to the news media, please see Tim Akin first before contacting reporters or editors. In consultation with campus News Service, we can offer expertise, advice on how to best to pitch a story. News Service may pick it up for an official campus news release to the right media.

√ Take photos! Share them with the GSM to further promote your club. Interested in TV-quality video and possible airing of your club event or activity on UCTV? See Tim Akin.

Tim Akin
Sr. Director of Marketing and Communications
Graduate School of Management
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twitter: @timakin
http://www.linkedin.com/in/timakin

The UC Davis MBA >> Ideas into Action
http://www.gsm.ucdavis.edu
Connecting with Alumni and Business Partners

Identifying and Contacting Alumni:

- Invite Alumni to Speak to Your Club/Student Group
  - You can locate alumni in the Online Alumni Directory. Our online alumni directory can be found at: https://alumni.gsm.ucdavis.edu.
  - We are dependent on alumni to keep their information in this directory updated.
  - Current students have access to information in this directory that alumni have chosen to share.
  - Although you are free to contact alumni directly using the directory, the GSM’s Development & External Relations and Career Development departments can help you identify alumni. Our alumni are generally excited to connect with and help students. Please contact Roberta Kuhlman, Director of Development & Alumni Relations for help finding alumni and GSM Business Partner resources. Please contact Career Development for additional alumni resources.
  - You may also refer to a list of previous student club officers that is maintained by the ASM and the GSM’s Development and External Relations department. Those who were in your position before will likely want to help you in some capacity.
  - Lastly, you can ask for assistance via the ASM’s director of development, who can bring your requests to the GSMAA Alumni Board of Directors or to Roberta Kuhlman, Director of Development and Alumni Relations.

- Publicizing club events in the monthly Alumni e-newsletter
  - Alumni Relations sends a monthly e-newsletter to alumni around the 1st of each month summarizing the latest GSM news and event information. Please let Roberta Kuhlman know if you have an event that needs to be publicized to GSM alumni via this publication. Please note that all requests must be received at least 2 weeks before the e-news is published. (Please refer to additional guidelines in the Marketing Student Events/Programs to External Constituents section of this handbook).

Appreciation/Recordkeeping:

- Let us know which alumni are helping you. The GSM tracks alumni participation. If an alumnus/na meets with your group, spends time mentoring you, or donates their company’s goods or services to your event, we want to know about it. Each month, a request from Roberta Kuhlman is sent to all students to find out if GSM alumni have given their time. Please let Roberta Kuhlman know how an alumnus/na has helped you out. We want to make sure that they are acknowledged for their assistance. This also helps us know who is willing to help in the future.
- Be sure to thank, both verbally and in writing, the alumni who donated their time and energy to help you. A handwritten thank-you note has the most impact. It’s important to remember that your actions reflect on others. If alumni feel as though their efforts are not appreciated, their willingness to participate in the future may be diminished. If the alumnus/na speaks at a student event or helps in a major way, please provide them with a gift/small token of appreciation. Small items may be purchased from Student Affairs and/or Career Development for this purpose.
Student Fundraising Guidelines

What Is Fundraising?
For University purposes, fundraising is defined as “any activity in which money is collected on campus.” Even if all you wish to do is break even or recover costs, your activity will be considered fundraising if money is collected. A separate Application to Raise Funds Form must be completed and approved for each fundraising activity. Some examples of fundraising are tournament entry fees, t-shirt and bake sales, ticket sales including events held off campus, raffles and soliciting donations.

Prior to doing any fundraising for your organization, you must contact Judy Nagai or Roberta Kuhlman to discuss your ideas. This first step will ensure that you are prepared to proceed and are as successful as possible. Given the sensitive nature of working with donors at the university level, not every donor is available for solicitation by student groups, or the GSM, for that matter. The Campaign for UC Davis is underway and many donors have already made plans to make gifts to UCD, some of which have been in process for several years if not longer. Therefore, we appreciate your understanding related to limitations regarding who your prospective donors might be. However, we will assist in brainstorming ideas for natural partners that may be in a better position to assist in your fundraising efforts.

NOTE: PLAN AHEAD! In order to raise funds on campus, you must have prior approval from CSI and also from the GSM Development & External Relations unit. Ask questions, check out your ideas, and get approval for your project early.

STUDENT FUNDRAISING GUIDELINES

Please refer to the Center for Student Involvement (CSI) website for the most up-to-date student organization fundraising guidelines and policies: http://campusunions.ucdavis.edu/?page_id=981.

A student organization is not considered a tax-exempt organization (the exception is C4C which is raising funds for a separate non-profit entity) and is therefore, not able to issue tax receipts for donations. The thank you letter from the student organization cannot state that the gift is tax deductible. This is based on the fact that the organization is not a 501c3 (non-profit status) and that it has autonomy regarding how it uses any money raised for the benefit of the organization.
ASKING FOR MONEY: Only one step of many in fundraising

Fundraising Terms:

**Identification**: your list of potential donors/companies

**Cultivation** getting to know your prospective donors and letting them get to know your club/organization.

**Solicitation** is when you ask for money. *This is the one piece of the process that is sometimes mistakenly seen as the whole.*

**Acknowledgement** is when you thank and acknowledge donors for their gifts. This includes sending thank you letters, including gift acknowledgements in your annual report or newsletter. Let donors know how you spent their money and stay in touch with them through the year (not just when it is time to ask again).

**Engagement** brings your donors closer into the life of your club/organization and what you are trying to accomplish. Many donors can give more than money. They can give their time, provide technical expertise, help secure resources and services at reduced prices or advocate on your behalf.

**Stewardship** keeps you in relationship with your donors. You think about them at times other than when you are in need of money. You invite them to events, keep them updated on your organization’s programs, successes and challenges, introduce them to new club officers, let them know what the club is doing this year. As you can see, fundraising is just one part of development. Don’t try to save money or time by treating donors as an ATM machine. Remember to focus on all the steps in the development process. TAKE A LONG TERM VIEW!
STUDENT FUNDRAISING GUIDELINES (taken from the CSI website: http://campusunions.ucdavis.edu/?page_id=981)

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In soliciting gifts, student organizations must not act as a representative of the University – the name of the University can be used only to identify the location of the group.

While you are not raising funds for the GSM or UC Davis, please do remember that you are ultimately representing the campus. It is important to ensure anyone in contact with potential donors upholds the professional and courteous reputation of the university.

Also, you are asked not to contact GSM Business Partners or Dean’s Advisory Council members. Please contact Judy Nagai to discuss your interest in contacting these groups.

Before approaching alumni, please contact Roberta Kuhlman. For tracking purposes, we need to know which donations were received so that the GSM can continue to thank these people for their on-going support and so that we do not over-ask any one group or individual.

Big Bang! is different from other student organizations in that the GSM’s Development & External Relations unit handles and monitors all gifts. Big Bang! gifts are tax deductible and a gift processing fee is applied to cover UC Davis administrative costs.

Campus Policies: Information on Fundraising on Campus
Taken from the UC Davis Center for Student Involvement website (http://csi.ucdavis.edu/sos/fundraising.cfm)

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Tips for Club Fundraising and Event Planning & Implementation (written by a former ASM President)

How can a group with constantly changing members create a reliable fundraising stream?

- Ensure early hand-over/induction of new members/officers/volunteers
  - Involve incoming members/students as early as possible and work together on projects to ensure knowledge from past years lives on within the club
- Create/maintain guidelines/records/history or best practices of fund-raising activity in the past so that new members do not have to “recreate the wheel”—be sure to keep adequate records of donations and donors.
- Maintain records of past club/committee members so that future sponsorships/donations can be solicited from these people—they are likely to be willing to donate if they can.
- Incorporate local membership dues if not already in place (in addition to national chapter dues): make sure this is done within campus policy guidelines [see Center for Student Involvement website: http://csi.ucdavis.edu/common/whatis.cfm]

What elements have we seen in effective events?

- Location/ambiance
- Using an interesting, relevant speaker, film, or other attraction
- Understand your audience
- Timing/Planning—must work far ahead—create a timeline starting with the end date and working backwards: understand and avoid date conflicts (other events, exams, midterms, holiday weekends, etc.—consider piggy-backing on an existing event—an option to save money, pool resources). Don’t forget logistics:
  - Recycling bins on-hand
  - Traffic flow for event/set up of venue
  - Invitations/save the date sent well in advance, at least 4-6 weeks
AND make sure your event objective is clearly defined. Why are you doing this? What are you hoping to achieve? Make sure planning supports the overall objective—ensure budget, staffing, etc. are all in line.

Evaluate events: post-mortems—brainstorm on how it could be better next time, learn from mistakes (and successes!) and record that information so the next event builds upon the success of the last one.

Describe the “mindset” of a fundraiser.

- Always looking for connections—find ways to involve or engage the greater community—includes ensuring recognition and thanks for those who help with time and/or money
- Building relationships is what we do—“friend raiser”
- Listening skills are important; listen to understand how to better engage them
- THANK YOU, THANK YOU, THANK YOU: NEVER forget to follow up every gift/sponsorship/etc. with a formal thank you: a letter, email, a phone call—make sure each and every donor is thanked in a timely manner. This is paramount in fund-raising!
- Think more about an ongoing relationship with donors rather than just for your one year of raising money at the GSM.

How does one go about setting up an effective corporate or individual sponsorship solicitation?

- Have a well-thought out plan/strategy for what you are trying to achieve. Build confidence amongst your corporate friends in your club chapter leadership
  A compelling pitch/executive summary. What are you trying to achieve? Why are you asking for sponsorship? How will support help achieve your goals? What does the corporate sponsor get out of it (signage, recognition at event(s)? Special invitations, or a number of complimentary invitations, etc.?)
- Consider approaching corporate partners whose interests fit with your chapter, have an affinity for your club values: consider your target audience and what you are “selling”
- Ensure thanks/recognition is followed through… be professional and take your corporate sponsors seriously—returning sponsors are ultimately what you would like to cultivate
- Consider your community of corporate donors (who are your prospects)
  - Local companies in the area
  - National companies that you, your club, or your fellow classmates have some sort of connection to
  - Speak to your campus development officers— they may have suggestions/ideas: make sure you are coordinating efforts with them in advance
  - Read local/national newspapers—understand who is involved in these kinds of activities
Where do you have alumni? Look at the alumni online directory and coordinate with GSM development officers.

- PLEASE—Prior to contacting any GSM donors or volunteers, you must discuss your interest with the GSM Development and External Relations office in advance. Once you begin fundraising, keep records of interactions with alumni and others and share with GSM Development Office for continuity.

Logistics of corporate sponsorship

- All letters should be typed and always address your letter to a named person. Phone up the company and ask who deals with sponsorship/marketing.
- Show what you can offer the sponsor in return for their investment.
- Always give a figure of how much sponsorship is required and what it is used for—state who benefits.
- Initial letters should be no more than one-page long.
- A more detailed breakdown of your proposal should be available on request. This should include: a detailed CV of your own or your organization’s RELEVANT history and achievements; a comprehensive breakdown of all the costs and full details of what you can offer any potential sponsor.
- Speak to the GSM Marketing and Communications director to see how you can contact your local papers/radio stations and ask for help in publicizing your case. The local paper could print an open letter to potential sponsors. Ensure you are following UC Davis policy for fund-raising when doing this!
- Find possible sponsors through Yellow Pages and your local Chamber of Commerce.
- If any of your fellow clubs/organization on campus have found a sponsor, ask them for help and advice on how to attract funding.
- Ask the advice of a local businessperson: they could help point you to a local company who may be interested, or to an individual who supports your cause.
- Target companies with a history of sponsorship and/or ties with your mission (also consider their competitors).
- Have one person coordinating all sponsorship proposals - this person should be available on the phone during working hours or via email.
- Always follow up your initial contact, either by letter or preferably by phone. Even if the response is negative, you should still thank them for their time… they may become a sponsor in the future.
- Perseverance is likely to be the key.

How do you “get in the door” with an organization if you don’t know anyone there?

- Look for marketing/PR contacts or community service contacts on their website, annual report, etc- also do Google searches on the company, look at checking press releases for contact information of a specific person. Once inside, it is easier to navigate and find the person you should be talking with….
• Check to see if your faculty advisor or any other contacts you might have on campus know anyone within the organization you are trying to approach.

What does one do to keep up morale in the face of a string of “no’s”?:
• Understand, just as in business, that you need a pipeline: for every yes, there are 7-10 no’s…you can’t take that personally.
• Help each other… keep your teammates (fellow committee members, other chapter chums, whoever-) informed of both your successes and frustrations…support each other, prop up morale.

Cheap “wow”s: the shoestring budget
• Host a meeting outdoors at sunset instead of in a ballroom/classroom
• Use of private homes (your faculty sponsor, perhaps?)
• Special lighting/special effects: candles are cheap, so are white Xmas light strings… cloth can be cheap, consider draping possibilities (and recycle/store for future events)
• Donation of food/drink— or decorations/giveaways/etc.
• Food is a very variable cost! Think simple
• Some facilities have basic/standard decorations or equipment that can be used free of charge, be sure to ask when booking a facility.
• Music—adds a great deal to atmosphere—can be as simple as a member bringing in a portable player….or bringing in CDs to play on facility sound-systems.