



Stony Brook School of Dental Medicine

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I. BUDGET

- A. Each year, clubs/organizations will submit a budget proposal to DSO outlining proposed events that will be held throughout the year—along with the requested amount of funding, if any. Submitting this request does not guarantee that you will receive the requested funds, but instead, will provide DSO with an idea of how to equitably allocate funds for the upcoming year.
 - The budget proposal for the upcoming year must be submitted with the end of year report on May 1
- B. Club activity and use of allocated funds provided by DSO will be used to determine anticipated funds for the following year.
- C. Clubs that receive funds in a given year are not guaranteed to receive the same amount in subsequent years.

II. EVENTS

- B. Events must be held on campus (except for special pre-approved events). ***Enrichment Seminars (aka Lunch and Learn), club meetings, and fundraisers are all considered events.***
 - Events require a minimum of **3 weeks** advance approval
 - All vendors have to be approved **prior** to the event
 - All events must conform to SBU policy
 - For events that receive DSO funding:
 - Must use “legitimate” vendors who can supply a W9 and an invoice
 - Signed attendee sheets must be submitted to the Office of Education within one week of the event
 - Zoom hosts can send report from meeting of attendees (under reports in zoom)
 - A minimum of 10 attendees per meeting is required for reimbursement.
- C. Large-Scale Special Events
 - In addition to the requirements above, large-scale special events (i.e. Spring Formal) require a minimum of **6 weeks** advance approval and invoice and W-9 must be submitted at least **3 weeks** prior to an event in order to be paid on time.
- D. Collected Funds

Students are not permitted to take Venmo or any other electronic payment method for events. All fundraising money / ticket sales must be submitted to the Office of Education.

III. END OF YEAR CLUB REPORT

- A. Please keep track of all events and pass down all historical documentation to the next class
 - End of Year Club Report - Due May 1
 - Report should include the following:
 - Events held
 - History of funds requested/received
 - New Officers and their contact information
 - Event Budget Proposal Form

IV. BOARD MEMBERS

A. Election

- Elections for new officers must be held annually and officers for the upcoming year should be established by May 1 and included on the end of year report.

B. Structure*

- 1 President
- 1 Vice President
- 1 Secretary
- 1 Treasurer

**Plus any other necessary titles/positions. Co-presidents and/or co-vice presidents are not recognized by the Office of Education.*

V. FUNDRAISING

A. Office of Education

- You must obtain approval to fundraise ***before*** starting the fundraiser. This includes, but is not limited to, what will be sold & for how much.
 - Contact the Director of Student Services

B. Advancement

- Any donation requests to vendors/organizations must be approved by Advancement. You cannot ask for donations in Stony Brook's name without approval.
 - Contact the Director of Advancement

C. Marketing & Communications

- All advertising, merchandise, and items sold for a fundraiser must comply with Stony Brook University brand policy. You must receive approval before advertising any items with the Stony Brook name on it (including Patagonia sale)
- Advertisement for the event can be displayed on the digital signage boards. Please refrain from email blasts. An "opt in" for email communication is under consideration.
 - Contact the Director of Communications

D. Clubs/organizations are not permitted to keep any cash/funds raised. All money raised must get deposited into FSA 748.

- After event, give funds to the Director of Student Services for deposit. Submit a follow up report indicating everyone who donated with amounts. An expense and revenue report must be submitted with net amount earned.

Event Request Policy & Form Instructions

Event Request Policy

1. Budget requests must be submitted by a Stony Brook SDM student and member of a **registered** school club/organization no later than **three weeks** prior to the date of the planned event. State funds may not be used to pay for alcohol, gratuity, or tax. Obtain the tax exempt form from the Director of Student Services.
2. All Enrichment Seminars presentations **must** be educational/informative. Vendors may NOT explicitly solicit or sell any of their products/services unless specifically requested to do so.
3. Enrichment Seminars must not financially benefit student organizations. Any funds received **must** be used towards purchasing food and refreshments for the Enrichment Seminar audience.
4. All events (including advertisements), must first be approved by the faculty advisor and/or sponsoring department, then DSO, then the Office of Education. All advertisements and/or merchandise must conform to branding policies (URL found at bottom of form). All outside speakers must provide a biosketch and abstract of presentation.
5. If the vendor/presenter does not wish to follow this policy, the Enrichment Seminar application will be declined.
6. Any Stony Brook School of Dental Medicine funded supplies or equipment (AV) borrowed for an event **must** be returned within 12 hours of the event.

Event Request Form Instructions & Process

In order to have an event (e.g. fundraiser, Enrichment Seminar), a request form must be submitted prior for approval. Once the form has been submitted and a decision regarding the event has been made, appropriate parties will be notified. The Request form must be submitted **no later than 3 weeks** prior to the date of the planned event (**6 weeks for large events**).

Action Required by Organization before Submission

Section A. Event Fundraiser Information

- 1) Fill out all event information

Section B. Enrichment Seminar/Speaker Information

- 1) Only fill out this section if you are having an Enrichment Seminar event

Section C. Budget Request Information

- 1) Only fill out section C if you are requesting funds for the event
 - a. Each line item listed in Section C must have an invoice attached.
- 2) Vendors: A vendor in this instance is defined as any company you have an invoice for and are looking to purchase supplies/services from. Be sure to list all vendors that will be used for the event.

Approvals Required before Submission

- 1) Faculty Advisor/Sponsoring Department
- 2) Directors of Student Services
- 3) Director of Communications
- 4) Director of Advancement, if applicable

Event Request Form

Event Information																									
Section A. Event Information	Section B. Enrichment Seminar/Speaker Information (if applicable)																								
Event Name: _____ Date of Event: _____ Start/End Time: _____ Location: _____ Expected Number of guests: _____ Sponsoring Club/Organization Name: _____ Faculty Advisor: _____ Event Summary: _____ _____ Student Requesting Event: _____ Student Email: _____ Will this event be advertised? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If yes, review branding requirements (attached) and submit with this application</i> Target Audience: (check all that apply) D1 <input type="checkbox"/> D2 <input type="checkbox"/> D3 <input type="checkbox"/> D4 <input type="checkbox"/> Advanced Ed <input type="checkbox"/> Faculty <input type="checkbox"/> Will you be purchasing any supplies or borrowing equipment that will be used for the event? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, please list supplies/equipment: _____ _____ Will you be selling any items for this event? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, please list items: _____ _____	Company Name: _____ Contact Name: _____ Presenter Name: _____ Presenter Credentials: _____ Phone: _____ Email: _____ Description of Presentation Content & Format: _____ _____ _____ Section C. Budget Request Information I. Are you requesting funds for your event? <input type="checkbox"/> Yes (fill out section below) <input type="checkbox"/> No (Skip budget information section) <table border="1" style="width:100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr style="background-color: #fff9c4;"> <th style="width: 70%; text-align: center;">Line Item*</th> <th style="width: 30%; text-align: center;">Amount Requested</th> </tr> </thead> <tbody> <tr><td> </td><td style="text-align: center;">\$</td></tr> <tr><td> </td><td style="text-align: center;">\$</td></tr> <tr><td> </td><td style="text-align: center;">\$</td></tr> <tr><td> </td><td style="text-align: center;">\$</td></tr> <tr><td> </td><td style="text-align: center;">\$</td></tr> <tr style="font-weight: bold;"> <td style="text-align: right;">Total Requested</td> <td style="text-align: center;">\$</td> </tr> <tr style="background-color: #fff9c4;"> <td align="center" colspan="2">* Must provide quote with each line item*</td> </tr> </tbody> </table> II. Vendors (if applicable; ex. Culinart) <table border="1" style="width:100%; border-collapse: collapse; margin-top: 5px;"> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </table>	Line Item*	Amount Requested		\$		\$		\$		\$		\$	Total Requested	\$	* Must provide quote with each line item*									
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Faculty Advisor Approval Event Approval: <input type="checkbox"/> Yes <input type="checkbox"/> No Biosketch and Abstract Attached: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Advertisement Approval: <input type="checkbox"/> Yes <input type="checkbox"/> No Print Name: _____ Signature/Date: _____	Director of Communications Approval Merchandise Approval: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Advertisement Approval: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Print Name: _____ Signature/Date: _____																								
DSO USE ONLY	OFFICE OF EDUCATION USE ONLY																								
<i>Event Approval</i>																									
Event Approval: <input type="checkbox"/> Yes <input type="checkbox"/> No Advertisement and/or Merchandise Review: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Event Approval: <input type="checkbox"/> Yes <input type="checkbox"/> No Advertisement Approval <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Merchandise Approval <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Room Reserved? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A Food Ordered? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A																								
<i>Budget Approval</i>																									
Requested Amount: _____ Approved Amount: _____ Comments: _____ Date of Budget Update: _____ Print Name: _____ Signature/Date: _____	Comments: _____ Print Name: _____ Signature/Date: _____																								
Stony Brook Branding Policy: https://www.stonybrook.edu/sbu-brand/ Tax Exempt Form: https://www.stonybrook.edu/commcms/foundation/resources/_pdfs/Tax%20Exempt%20Certificate%2012%202018.pdf Stony Brook Catering Site: https://sbucatering.catertrax.com/																									

*Event Budget Proposal
2022-2023 Academic Year*

Month	Event/Fundraiser Summary	Intended Audience/ Estimated number of guests	Amt of Funds Requested
August			
September			
October			
November			
December			
January			

Month	Event/Fundraiser Summary	Intended Audience/ Estimated number of guests	Amt of Funds Requested
February			
March			
April			
May			
June			
July			

Proposed Total Amount of Funds Needed: \$ _____