



WEATHERHEAD SCHOOL  
OF MANAGEMENT

**2019-2020 Graduate  
Student Club Handbook**

# **Weatherhead Graduate Student Organization Handbook**

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## Introduction

This handbook is a resource for the members of the graduate student community who have leadership roles within Weatherhead School of Management student organizations. Weatherhead student organizations are dedicated to creating an atmosphere for comprehensive business learning and facilitates communication between students, administration, faculty and staff, and alumni. Clubs are primarily focused on the areas of professional and cultural development, academic and extra-curricular achievement, and community involvement.

By following the procedures as they have been outlined in this handbook, the responsibility of organizing a club, program development, and finance will be much easier, effective, and rewarding. Please feel free to direct any questions or comments concerning the information contained in this handbook to the Student Experience office, located in PBL 150.

## Roles and Responsibilities

### Student Experience (STEX)

The Student Experience Office in Graduate Student Services is here to assist all Weatherhead students with finding opportunities for involvement in clubs, tickets for local events, and connecting to the best resources on campus for their needs. Our office works to provide experiences outside of the classroom that will complement the holistic learning environment for Weatherhead students. The office's primary responsibilities are:

- Coordinate major events at Weatherhead
- Advise all graduate student clubs, including the governing body, Graduate Business Student Association (GBSA)
- Advocate for students, including for students who need disability accommodations
- Conduct of students, as outlined in the Student Handbook

The STEX team are also great resources for clubs in planning and executing club events.

### Graduate Business Student Association

GBSA allocates money to the Weatherhead student organizations for their events. GBSA also coordinates events such the Weatherheadless Ball, Casino Night and the accompanying faculty auction. Elections are held in the fall and spring semesters for GBSA. The fall elections are for directors and program representatives and spring elections consist of the executive team positions.

### Graduate Student Council

Graduate Student Council (GSC) gives graduate students a voice in their disciplines and relevant university affairs. Representatives serve as spokespeople, taking students' individual and collective interests to faculty and university administrators. There are opportunities for co-sponsorships and reimbursements through GSC. Email [gscinfo@case.edu](mailto:gscinfo@case.edu) for general questions or visit their Campus Groups page.

### Club Advisors

All student clubs must have a full-time WSOM employee as an official advisor. An advisor serves to assist the club in achieving its goals and objectives in various ways such as offering advice on programming topics, assistance in coordinating guest speakers/judges for club events, etc. Club Advisors should not: run club meetings, vote or have veto power over decisions, or be responsible for program details/execution.

### Club Officers

All organization should have no more than two club officers. These officers should include one person designated as the President. Selection of club officers shall be at the discretion of the outgoing leaders during the spring semester (or fall for clubs that choose a mid-year transition such as the Operations Club). No individual shall serve as an officer of more than one club at any given time without pre-approval from STEX.

Should a single Club Leader jeopardize the Good Standing of a club through failure to attend meetings, failure to properly communicate with GBSA/Stex leadership, or other acts of unprofessionalism, GBSA/Stex reserves the right to remove that leader from the club and appoint a replacement.

## **General Regulations**

### How to Create a Club

Students that are interested in starting a new club for WSOM graduate students needs to complete the following steps and the "Proposed Club" form found in the appendix of this handbook.

- Identify a WSOM faculty or staff member who is willing to advise your club. Have them sign the "Proposed Club" form where applicable.
- Have a proposed membership list of at least **five** interested, currently enrolled WSOM graduate students for academically related clubs and **ten** interested, currently enrolled WSOM graduate students for non-academically related clubs.
- A detailed rationale of what the purpose of the club is, how it is different from the other clubs already in existence, what goals it will work to achieve, and details for at least two events to be held within the first semester of the clubs existence.

Clubs may be proposed at any time, but will only be considered for approval to begin at the start of an academic semester. Upon approval, a new club will remain on probationary status for one semester before obtaining full club status.

### Remaining in Good Standing

In order for a club to remain in good standing, the guidelines listed below must be met each semester. The club must:

- have an active executive officer (President) that attends all club leader meetings and submits all required documentation
- club leaders should meet with the STEX team within the first two weeks of the semester to discuss their semester goals and programming outlines
- hold at least two events, open to all WSOM graduate students
- track attendance at each and every club event through Campus Groups
- follow all guidelines for appropriate use of club funds

Should a club not meet these guidelines in any given semester, they will be placed on probationary status for one semester. During that semester, they must meet all above listed guidelines and meet with the STEX team to establish club goals to be accomplished by the end of the probationary semester. Failure to meet these goals and guidelines during the probationary period may result in the club being suspended or dissolved.

Should a single Club Leader jeopardize the Good Standing of a club through failure to attend meetings, failure to properly communicate with GBSA/Stex leadership, or other acts of unprofessionalism, GBSA/Stex reserves the right to remove that leader from the club and appoint a replacement.

### Attendance Tracking

Club leaders should record attendance via Campus Groups for all club events, as this will be how STEX and GBSA will track participation in club events. Detailed instructions on how to track attendance can be found in the appendix of this handbook.

Attendance at club functions will be considered when allocating funds to event proposals.

## **Club Finances**

Each club will receive funding on an event by event basis. The Club Event Funding Request form (found in the appendix of this handbook) must be submitted at least three weeks prior to the program date in order to be considered for GBSA funds. The funding request form asks for a breakdown for proposed expenditures; clubs are only permitted to spend provided funds on

what has been pre-approved. Reimbursements will not be given on items that are not pre-approved by GBSA and STEX. As a general guideline, cost of events should not exceed more than \$10 per student in attendance.

**Reimbursements:** While STEX can assist with purchases of food and catering, or of items from the university bookstore, some items may need to be purchased by club leaders who can then be reimbursed. Reimbursements will not be given on items that are not pre-approved by GBSA and STEX. Additionally, the university will not reimburse for tax.

**Funds and Alcohol:** Clubs will need to provide rationale for providing alcohol with club funds for events. A “happy hour” that does not have a direct academic or learning component coupled with it will not be considered for funding. STEX will work directly with club leaders on events that have been approved for alcohol to determine number of drink tickets that can be provided to attendees.

**Funding and Case Competitions:** GBSA funding will not be provided for students/club members to attend case competitions. The Career Management Office and Student Experience Offices provide up to \$100 to individual students toward attending case competitions each year. The document to request this funding through CMO and STEX can be found in the appendix of this handbook for your convenience.

Clubs that are interested in hosting a case competition should speak directly with the STEX team about their proposed ideas and should plan to collaborate with other Weatherhead student groups on the project if approved. Please note that if your club would like to propose a case competition that is open to students of other institutions, funding must be secured from an outside source.

**Funds and Events Outside of Weatherhead:** GBSA/STEX funds are to be used exclusively for events planned and sponsored by Weatherhead Graduate Student Clubs that are for all Weatherhead graduate students. Partnering with another organization on campus for an event can be considered if it is open to all Weatherhead students and has a business focus. Club leaders should not in any way commit funds to events they are not the primary sponsor until their proposal has been submitted and approved by GBSA/STEX.

**Funds and Speaker Gifts:** When inviting guest speakers from outside of Weatherhead to be a part of a club event, leaders often like to provide the individuals with a gift. Due to university policies and restrictions, gift cards cannot be purchased. Consider purchases from the university bookstore. Gifts should not exceed \$25 per speaker.

**Additional Funding Opportunities:** There are several opportunities for clubs to seek funds outside of GBSA, specifically for events that they would like to open to students outside of the graduate community at Weatherhead. These options include the Graduate Student Council (GSC), seeking outside sponsors, and/or charging a small fee for attendance to club events. STEX should be consulted prior to approaching any sponsors outside of GBSA or GSC.

## Club Events

Each club is required to host at least two events per semester open to all graduate students at Weatherhead. When hosting a club event the following steps must be followed:

1. Submit an event funding request form to GBSA at least three weeks prior to event date. Form can be found in the appendix of this handbook.
2. Upon approval of your program, an event should be created on your Campus Groups page and advertisements should be created for the monitors throughout PBL. These advertisements can be submitted to Mimi to be included in the slide show and should contain wording indicating that the event is open to all Weatherhead Graduate students.
3. Book a location for your event. The STEX team will be happy to help you with this.
4. For events that will include guest speakers/panelists, alumni, company representatives, or other individuals outside of Case Western Reserve University students/faculty/staff consult with STEX prior to reaching out to these individuals. It is also recommended that clubs begin this process **at least one month prior to their event.**
5. If you have been approved for alcohol, you must submit an alcohol use form via Campus Groups (<https://community.case.edu/aur/surveys/>) at least seven days prior to your event. Failure to do so will mean alcohol cannot be served at your event.
6. Order food/catering necessary for event. Again, the STEX team will be happy to help with this step! Make sure you are only spending what you have been approved for by GBSA/STEX. You will not be reimbursed for additional expenditures.
7. Track attendance at event via the event created on your club Campus Group page.
8. Submit all receipts for reimbursement within five business days of event.

Three weeks out is the **minimum** amount of time a club should allow to begin planning an event. Events that will include guest speakers/panelists, alumni, company representatives, etc. should allow additional time to plan to assure the greatest success of your event. Club leaders are encouraged to plan and coordinate logistics for their two required events early in the semester in order to better balance club obligations with academic requirements.

## Campus Groups

Campus Groups will be utilized by clubs for tracking of events, event attendance, collecting event fees, communication with group members, and for utilization of other features provided through the platform.

A few things to note:

- Only Weatherhead graduate students will be able to join your group pages.
- Do not change the privacy settings on your group page.
- April Dix and George Smiltins should remain group "Officers" so that we are better able to assist you with your pages.
- Your group page is set up to be able to collect money for tickets. Please connect with STEX prior to posting an event where you want to sell tickets/collect revenue.
- Your club automatically has a website generated for them through Campus Groups. Please make sure to check that this is up to date and continue to maintain it throughout the year.

## University Alcohol Policy

The university conforms to all state and local laws controlling the sale and use of alcoholic beverages. It is illegal to sell, provide, or serve beer, wine, or liquor to anyone who is under the legal age of 21. Servers of alcohol and sponsors of social events must be aware of and comply with all state statutes and with Case policies and procedures.

The university expects responsible behavior of students who choose to drink alcoholic beverages and requires an environment free of coercion for those who choose to abstain. Therefore, students must adhere to guidelines provided by the University for responsible and legal consumption of alcoholic beverages. Individual students must accept responsibility for their own behavior and should demonstrate a concern for the safety and well-being of others in the university community.

The following regulations apply to all events, both on and off campus, at which students are present:

1. The sponsors of the event where alcohol is served must file an Alcohol Use Report on Campus Groups (<https://community.case.edu/aur/surveys/>). Student Organizations must complete the report at least seven (7) days prior to the event, allowing time to meet with the Student Experience Office and receive final approval from the Office of Student Affairs. The approved form must be printed and posted at the event.
2. At all events where alcohol is served, an effective procedure must be established and adhered to for certifying those legally of age to drink. To obtain alcoholic beverages, a valid driver's license or other valid legal document showing proof of age must be presented. A Case ID may also be required for admission.



3. The quantity of alcohol will be determined by using the following formula: **number of servings = number of legal drinkers in attendance x hours of event.**
4. At all events where alcohol is served, **non-alcoholic beverages must be provided by the sponsor of the event.** The amount of alcoholic beverage provided should reflect the proportion of those attending the event who are legally eligible to drink; the amount of non-alcoholic beverage provided should be sufficient to serve the number of people attending the event who are too young to drink or choose not to drink alcohol.
5. No one should be coerced, even subtly, to drink or overindulge, and the rights of those who choose to abstain must be respected. To that end, **drinking games are not allowed at any university or student group-sponsored events.**
6. When alcohol is served, food must be provided by the sponsor of the event in adequate amounts to last through the event.
7. The kind and amount of security required for an on-campus event will be determined according Case Police Department guidelines. Factors to be used in determining the kind and amount of security at an event include: the nature of the event, the number of people attending the event, whether alcoholic beverages are being served, and whether cash will be on hand. At an off-campus event the kind and amount of security shall be determined by the third party vendor providing the alcohol.
8. Social events which encourage drinking or drunkenness as themes and the advertisement of such events are considered inappropriate and will not be permitted. Neither the cost nor brand of an alcoholic beverage may be advertised in Ohio.
9. When beer or malt-based beverages are provided, it must be served to individuals in single serving containers of 16 ounces or less. When wine or liquor is provided, it must also be served in appropriately sized glasses, no greater than six ounces for wine and two ounces of liquor per drink.
10. The serving of alcohol must cease at least one-half hour before the scheduled end of the event.
11. When entertainment is included in the event, the type of entertainment and the duration must be listed on the Alcohol Use Report.
12. Individuals or groups violating state law or the university student alcohol policy will be subject to disciplinary action.

Clubs will need to provide rationale for providing alcohol with club funds for events. A “happy hour” that is does not have a direct academic or learning component coupled with it will not be considered for funding. STEX will work directly with club leaders on events that have been approved for alcohol to determine number of drink tickets that can be provided to attendees. **Events that are being held in the Peter B. Lewis building will not be permitted to serve alcohol.**

**Club Event Funding Request**

Club(s) Sponsoring Event: \_\_\_\_\_

Event Title: \_\_\_\_\_

Event Date: \_\_\_\_\_ Time: \_\_\_\_\_ Expected Attendance: \_\_\_\_\_

Proposed Event Location: \_\_\_\_\_

Event Purpose and Summary: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Funding Amount Requested: \$** \_\_\_\_\_

Please provide a breakdown of proposed expenditures below.

Item	Vendor	Amount	Rationale	Aprv?

If you are requesting alcohol for your event, please give a detailed explanation of how it contributes to the goals of the program: \_\_\_\_\_

\_\_\_\_\_  
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**Event Approved by GBSA:** \_\_\_ Yes \_\_\_ No

**Funding Amount Approved by STEX:** \$ \_\_\_\_\_ **Alcohol Approved:** \_\_\_ Y \_\_\_ N

## Programming Tips and Timelines:

- Funding Request forms must be submitted to GBSA **three weeks** prior to your program date.
- Room requests can/should be submitted as early as possible. You can request your meeting space prior to having your funding request approved. Please work with April and/or Mimi to reserve your space.
- If your program has requested and is approved to have alcohol, you must submit your alcohol use report **at least two weeks prior** to your program date. This is done through Campus Groups:  
<https://community.case.edu/aur/surveys/>
- Upon approval of your program, an event should be created on your Campus Groups page and advertisements should be created for the monitors throughout PBL. These advertisements can be submitted to Mimi to be included in the slide show and should contain wording indicating that the event is open to all Weatherhead Graduate students.
- Make sure you are only spending what you have been approved for by GBSA/STEX. You will not be reimbursed for unapproved expenditures.
- The STEX team is here to help! If you have any questions or need assistance in any part of your planning process, please don't hesitate to reach out to George, April, or Mimi!

