

To: Engineering Student Organization Leaders

From: Ryan Hopely, Associate Director of Student Life (ADSL)

Date: March 3, 2025

Subject: Student Organization Policies & Processes Memo - Spring 2025

Dear Penn Engineering Student Organization Leaders,

We hope your semester has been excellent so far. With student organization events and activities in full swing, we wanted to share written guidance for common processes and recent policy updates. Our goal is to increase transparency and provide access to resources and guidance that will help you be successful.

Some of these policies are new and serve as interim measures while formal policies and processes are developed in collaboration with students and various partners across Penn Engineering and the University. These policies are subject to change over time. In the future, I hope to provide an even more complete handbook/resource guide that further clarifies these processes and addresses topics not included in this memo. Your feedback will be integral to the development of this resource.

You will have an opportunity to provide feedback on these policies and guidelines in a link at the end of this memo. Additionally, I am working with ESAC and GSEG to identify opportunities for in-person conversations with student organization leaders regarding the topics outlined below. I have asked ESAC to set aside time for me to discuss this memo at their next GBM on Monday, March 3rd at 7:30 p.m. in Wu and Chen Auditorium.

Effective immediately, all organizations must adhere to the following guidelines:

1. Student Organization Affiliation

By their nature, student organizations with any formal tie to the University of Pennsylvania and/or the School of Engineering and Applied Sciences (SEAS/Penn Engineering) are inextricably affiliated with the university. Therefore, all activities of any student organization are considered activities of the University of Pennsylvania. Therefore, all activity is beholden to the University's, Penn Engineering, and the Office of Academic Services policies, practices, procedures, and expectations. Examples of common formal ties include ESAC recognition, obtaining GSEG funding, reserving space for events/meetings in association with an academic department, etc.

All organizations seeking to use University and/or SEAS resources must be registered with Penn Clubs. The deadline to register for Spring 2025 is this Friday, March 7. Penn Engineering will be flexible for the remainder of this semester on this requirement. To begin, [please follow this link](#).

2. Room Reservations

Undergraduate Student Organizations

Space reservations for events and meetings will only be approved for undergraduate student organizations officially recognized by the Engineering Student Activities Council (ESAC) on a first-come, first-serve basis. Space reservations for academic purposes (including but not limited to classes, TA hours, faculty recruitment seminars, etc.) and signature University programming (including but not limited to Commencement, Open House, etc.) take priority over student organization requests. If ESAC does not currently recognize your organization, please work with them to become recognized by following the information on their [website](#). Once you are recognized, you can make requests [using this link](#) on the Penn Engineering website.

Graduate & Department/SEAS-affiliated Student Organizations

Non-ESAC-recognized student organizations, including graduate student organizations, must have a formal affiliation with SEAS. These organizations must be associated with a department or office and have a full-staff staff or faculty advisor whose primary work assignment is in SEAS. The Office of Academic Services is working on building a list of organizations that fall under this category. If this applies to you, [please fill out this brief form](#) to ensure there are no delays in processing your room reservation request. You can make requests [using this link](#) on the Penn Engineering website.

Space reservations for events and meetings are reviewed on a first-come, first-serve basis. Space reservations for academic purposes (including but not limited to classes, TA hours, faculty recruitment seminars, etc.) and signature University programming (including but not limited to Commencement, Open House, etc.) take priority over student organization requests.

Room Reservation Request Turnaround Time

Organizations approved to request space should make their request at least two weeks in advance. All requests submitted via the official system within two business days before the event start date may be immediately denied by the Associate Director of Student Life (ADSL) and/or Facilities. Once submitted, your request goes to the ADSL for review. After receiving approval, your request is sent to the Space Reservation team in Facilities for final approval/denial.

Based on the information provided in your request, the Space Reservations team may assign security or housekeeping to your event. This assignment is non-negotiable and its associated costs will be incurred by the student organization.

Requesting Non-Penn Engineering Space

If your organization is unable to receive a space through Penn Engineering, you are encouraged to use [University Life's central space reservation system](#) instead. Please be sure to read the information on their website.

3. Funding, Budgets, and Purchasing

All purchases must be coordinated according to the established Office of Academic Services (OAS), Penn Engineering Financial Services (PEFS), Development and Alumni Relations (DAR), ESAC, and GSEG/GAPSA financial procedures. Unauthorized purchases made outside of these guidelines will not be approved. For general, University-wide guidance regarding student organization spending, please [review the resources listed here](#). Key policies and reminders include:

ESAC, GSEG, & GAPSA Funding

The [Engineering Student Activities Council](#) funds undergraduate student organization events and activities, while the [Graduate Student Engineering Group](#) and [Graduate and Professional Student Assembly](#) fund graduate student organizations. These organizations have their own funding guidelines. For information about them, please review their websites, linked above, or reach out to them directly.

PEC Travel Funding

Travel funding for undergraduate student organizations is available through the [Penn Engineering Council](#).

Student Organization Budgets

After ESAC recognizes a new organization, you will be assigned a CREF - a four-digit code that denotes your organization's financial accounts. Automatically, all student organizations that receive a CREF are given two accounts: Expense and Revenue. Student organizations spend from their Expense account, and any fundraised money comes into their Revenue account. When you are allocated funds from a body like ESAC, GSEG, SAC, or GASPA, those funds are deposited into your Expense account with the expectation that they will be spent that fiscal year on the expenses detailed in its associated request.

Student organizations are responsible for knowing their budget codes and supplying them when purchasing. At the end of the fiscal year, money remaining in an Expense account is zeroed-out. Money in a Revenue account is held year to year. In the event a student organization overspends in their Expense account, money will be transferred from their Revenue account to clear the deficit. In the event there is a remaining deficit, you will be contacted by OAS and/or PEFS and a plan will be made to resolve the deficit.

Forbidden Purchasing

Organizations may not purchase gift cards for any purpose. Organizations cannot offer money as a prize or incentive. Undergraduate students cannot purchase alcohol.

Ordering From Amazon

Organizations can work with PEFS to order simple, smaller items from Amazon. PEFS will need written approval for every purchase - the organization must know if they are spending ESAC/GSEG/SAC or Revenue funds and obtain approval accordingly. Please provide links to the items you want from Amazon and a short description of the purpose of the items.

Organizations should work at least two weeks in advance when ordering from Amazon. Once approved, forward the approval email to purchasing@seas.upenn.edu and explain that you would like the linked items ordered from Amazon. You must provide your Expense budget code at that time. You must also provide an address to deliver to and your phone number. You must also provide PEFS the written approval granted to you from the appropriate source. If you are unsure who should provide such approval, please reach out to the ADSL. Once PEFS approves and places the order, it will be shipped to the address you provided for you to pick up.

It is recommended that you send items that can be shipped to an Amazon Locker, specifically to the Locker at the following location: Amazon Hub Locker+ (Penn), 3800 Locust Walk, Class of 1920 Commons, Philadelphia, PA, 19104-6190 United States. If you send it to this Amazon Locker, the ADSL will receive a code for your pickup and then forward it to you. The code cannot be shared with others and the person with the code must pick up the item.

If your Amazon order cannot be sent to the Amazon Locker, you will instead send it to the Copy Center. The Copy Center will receive it, then you must pick it up from the Copy Center within two business days. You should use the following address for the Levine Copy Center:

[Your Name]
220 S 33rd Street, Towne 109
Philadelphia, PA 19104

Purchase Orders

Obtaining a purchase order, or PO, is the preferred method of payment for services, larger orders such as catering, and special items. All organizations should work at least two weeks in advance when seeking a purchase order. You must obtain an invoice from a [Penn-approved vendor](#), send it to ADSL for approval along with a short description of the order's purpose, your Expense budget number, your phone number, and delivery address if applicable. Once approved, you will forward all of that information and the approval to purchasing@seas.upenn.edu. The ADSL and PEFS have the authority to deny purchase order requests.

Shipping/Delivering Items

Some items, including larger Amazon items, need to be shipped to the University. All orders must go to the Levine Copy Center and cannot be delivered to individual residences. PEFS Purchasing does not track orders or ping suppliers - the student is responsible for maintaining contact with the supplier. You must use the following address when submitting non-Amazon Locker orders.

[Your Name]
220 S 33rd Street, Towne 109
Philadelphia, PA 19104.

The Copy Center will receive it, then you must pick it up from the Copy Center within two business days. You should use the following address for the Levine Copy Center:

Larger items, including those that are heavy or require substantial storage, may not be shipped to the University unless the ADSL pre-approved a plan to store it. The ADSL will need to liaise with other departments in order to create a plan. This process can take up to or even more than two weeks depending on the complexity of the delivery. If the University cannot store an item, it is up to the student organization to find external storage options. In some cases, student organizations can use their funds to purchase external storage.

Reimbursements

Individuals can request reimbursement for an expense they personally incurred.

Reimbursements are the least preferred method of payment by Penn Engineering.

Reimbursements are a back-up method to resolve expenses that reasonably could not be planned for. Repeated reimbursements that indicate a lack of planning from the organization may result in sanctions against the organization. The organization must have the funding to cover the reimbursement. There are two major pathways that reimbursements are processed:

ESAC/GSEG Expense Account Reimbursements: After receiving a budget allocation from ESAC or GSEG, student organizations will work with their relevant governing organization to manage the reimbursements. The organization itself will liaise with PEFS in order to ensure those seeking reimbursement are registered in Concur. There should only be one purchaser per organization for these types of purchases. Students are not permitted to submit for reimbursement of an expense that another student incurred. The receipt submitted to ESAC/GSEG should show that the name of the person who made the purchase matches the name of the person seeking reimbursement.

Revenue Account Reimbursements: If a student organization made purchases with the plan to ultimately spend from their Revenue account, then this process is separate from ESAC/GSEG and instead is managed by the ADSL.

The ADSL must approve all reimbursement requests. You must email the ADSL a copy of the receipt with key information such as the vendor, items purchased, purpose, and cost. It may take up to two business days for the ADSL to review and respond to your request. The ADSL maintains the authority to deny reimbursement requests. Alcoholic beverages may not be reimbursed for undergraduate student groups. In general, organizations should seek to spend no more than \$25 per person per meal, though flexibility based on budget will be taken into consideration. Only ESAC or SEAS-affiliated organizations may seek reimbursement from their Revenue and/or Expense accounts.

The ADSL's approval then goes to PEFS, which maintains final approval or denial authority. Taxes will not be reimbursed. To seek reimbursement, you must gain approval from the ADSL to register with Concur in advance. Unlike Expense account reimbursements, there may be more than one purchaser/reimbursement seeker, though efforts will be made to keep the total number to a minimum. Each person seeking reimbursement must have their own registration with Concur and seek their own reimbursement. Reimbursements cannot be pre-approved in advance. Reimbursement requests over \$500 are subject to additional review.

Students are not permitted to submit for reimbursement an expense that another student incurred. The receipt submitted to the ADSL should show that the name of the person who made the purchase matches the name of the person seeking reimbursement.

External Accounts

No student organization may hold funds in external accounts, including, but not limited to, bank accounts, Venmo, Cash App, PayPal, etc. Penn Engineering Financial Services (PEFS) will own and operate all student organization funds. Each organization is responsible for maintaining a written record of their spending, which they may check with PEFS as needed. If your organization is holding funds separate from the University, you must inform the ADSL immediately. You will then work directly with the ADSL to determine the necessary steps to move those funds to PEFS and close all external accounts.

4. Proper Relationships with External Entities

Any formal or informal relationship with external entities is beholden to the University of Pennsylvania's, Penn Engineering's, and the Office of Academic Services's policies, practices, procedures, and expectations.

No student may sign a contract on behalf of the University. Proper university personnel must review all contracts for lectures, performing arts activities, competitions, programs, goods, and services sponsored by student organizations. Your first point of contact when seeking to have a contract signed is the ADSL in Penn Engineering.

Proper assessment of safety and risk may include vetting and approvals needed by offices, including but not limited to Risk Management, the Office of General Council, Environmental Health and Radiation Safety, and the Division of Public Safety.

Students cannot enter a relationship with an external entity under a different or personal name. Students may not use personal resources to fund these relationships. Students may not find another entity to enter into an agreement on their behalf. There is no way to separate an individual's actions from their status as a member of a registered student organization.

Failure to comply with these policies may result in disciplinary action, including immediate suspension of organization operations.

5. Fundraising, Sponsorship, and Alumni/Donor Giving

Student organizations can fundraise and/or seek sponsorships and gifts from external entities. However, proper process must be followed at all times. The following guidance serves in an interim capacity until further feedback and review can be completed:

Fundraising For Your Organization

This activity refers to raising funds by selling items such as food, merchandise, and/or tickets. Fundraising activity must be approved in advance by the ADSL. All funds earned must be deposited into your organization's Revenue account, associated with your CREF held and

maintained by PEFS. All funds must be deposited into your PEFS account via check or wire transfer per PEFS policy. All checks received by student organizations in support of their group activities must be made payable to the Trustees of the University of Pennsylvania and immediately endorsed with "For deposit only to the account of the Trustees of the University of Pennsylvania" on the back of the check.

Fundraising For a Charitable Organization

Student organizations are permitted to raise funds for non-University charities. All fundraising events and activities by Penn Engineering student organizations must be approved in advance by the ADSL. Approval will only be granted for fundraising on behalf of charities which are nonprofit, tax-exempt organizations. Student organizations may not contact alumni or donors to fundraise for non-University charities. Checks received in response to charitable projects for non-University charities must be made payable to the non-University charity. The student organization should send checks payable to a non-University charity directly to the charity. The University will not issue gift receipts on behalf of non-University charities. Student organizations should contact non-University charities to determine whether the charities will provide gift receipts directly to donors.

Corporate Sponsorship

When seeking funds from corporate donors, student organizations must obtain approval in advance from the ADSL. All funds earned must be deposited into your organization's Revenue account, associated with your CREF, held and maintained by PEFS. All funds must be deposited into your PEFS account per PEFS policy. Student organizations are subject to review of which corporations they reach out to and the materials they send them. Sponsors must provide you with a written document, such as a Memo of Understanding (MoU), that explains the sponsorship in detail. That document must then be sent to the ADSL, who will work with PEFS to ensure the sponsorship can be executed. Some sponsorships will not be accepted, especially those that require action on the part of the organization and/or the University of Pennsylvania. This process can take up to two weeks; your plan should include this processing time. Alternatively, a corporate sponsor can still make a gift (see Alumni/Individual Gifts, below).

Student organizations are responsible for supplying proper documentation of their status as affiliated and tax-exempt organizations. All checks received by student organizations in support of their group activities must be made payable to the Trustees of the University of Pennsylvania.

Alumni Gifts & Individual Donations

Student organizations must obtain approval to initiate the alumni fundraising process from the ADSL. After obtaining that approval, groups must meet with University Life to review the [Student Fundraising Guidelines](#) to make a determination about the appropriateness and eligibility of their proposed fundraising. After reviewing these guidelines, student organizations must send a list of donors they tend to solicit and all associated sponsorship materials to the ADSL (studentlife@seas.upenn.edu), University Life (vpul-pennosa@pobox.upenn.edu), and Penn Engineering Development and Alumni Relations (alumni@seas.upenn.edu) for review and approval. In the event a single gift may meet or exceed \$25,000, student organizations are

required to notify these parties in this email as well. Guidance provided by University Life, OAS, and/or Development and Alumni Relations must be followed. Students may not solicit from [Board members](#).

All funds earned must be deposited into your organization's Revenue CREF, which is held and maintained by PEFS. All funds must be deposited into your PEFS account via the methods listed on this [website](#). Student organizations may [share this link](#) with alumni/individuals to facilitate accepting gifts. No new Student Organization Fund Accounts will be created (note: this is different from your PEFS CREF. This is in reference to accounts managed by Development and ALumni Relations). All student organizations will use DAR's SEAS Student Organization Fund, linked above.

Please recommend that donors select "Special Reason" as the Gift option and write the student organization's name in the Comments box. Once received, the gift will be processed by Penn Engineering Development and Alumni Relations. Once they complete their processing, PEFS will deposit the gift into the organization's Revenue account. This process can take up to two weeks; your plan should include this processing time. Student organizations may contact purchasing@seas.upenn.edu at any time to inquire whether a gift has been deposited into their PEFS account. Development and Alumni Relations will generate acknowledgments for gifts of \$2,500 or more. All donors will receive a tax receipt from the Treasurer's Office.

6. Club Storage & Makerspace

Penn Engineering recognizes that access to storage and makerspaces remains a significant challenge for many student organizations. While there are no immediate updates, we assure you that your concerns are being taken seriously. We have launched a review of our space allocation policies and procedures to better support the evolving needs of our academic community. This process will include input from student leadership to ensure equitable and practical solutions. While no adjustments will be made during the 2024-25 academic year, we are committed to refining our approach and will provide updates ahead of Fall 2025.

7. Staff/Faculty Advisor

All student organizations are required to have a full-time staff or faculty advisor. The ADSL may **not** serve as a single organization's advisor. Organizations are expected to obtain written permission from their faculty/staff advisor to list them as their advisor and to renew this agreement annually during annual ESAC auditing and regularly with GSEG.

8. University Staff Availability & Processing Times

University staff are available to support regular organizational business Monday through Friday, 9:00 AM – 5:00 PM. In the event of an after hours emergency, such as needing on-site assistance at an event/meeting, you can contact Engineering Operational Services at 215-898-5598. Requests will be processed in the order they are received. During peak periods, please allow additional time for approvals. Plan ahead and submit requests as early as possible.

to avoid delays. A general rule of thumb is that any request made less than two business days before a necessary action will be denied, though extenuating circumstances can apply. At all times, student organizations should be working two weeks in advance.

Additional Recommendations

To help manage the high volume of student organization inquiries, we encourage you to:

- **Use Available Resources:** Review the [ESAC](#) (undergraduate) and [GSEG](#) (graduate-Master's and PhD) websites for guidance before contacting staff with questions.
- **Submit Complete Requests:** Incomplete or incorrect submissions will delay processing. Ensure that all required information is included in initial requests.
- **Assign a Point of Contact:** Designate one or two members to communicate with university staff to streamline correspondence and avoid duplicate inquiries.
- **Respect Processing Timelines:** Avoid last-minute requests and allow ample time for staff to process approvals, particularly during busy times.
- **Include Your Advisor:** Your advisor may have information and resources of critical assistance. Please be sure to maintain regular communication with them.

We appreciate your cooperation and commitment to following these guidelines. If you have any questions, please contact our office at studentlife@seas.upenn.edu. This memo will be reviewed at the end of the semester, and any updates will be shared at the start of the Fall 2025 semester. To provide feedback on these policies and practices, [please submit this form](#).

Best regards,

Ryan Hopely
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Office of Academic Services
Penn Engineering