

PENN STATE MBA

ORGANIZATIONAL GUIDELINES

LCD Board Slides	Page 2
Listserv Management	page 2
Student Exchange Management	page 3
Blog Management	page 4
220 Organizational Guidelines	page 5 - 8

For technical assistance, contact Chelsea Benton-Monahan (cnb5002@psu.edu, 814-863-5785)

LCD Board Slides

Associations are welcome to advertise their events using the LCD Boards. Sandy manages the LCD board system with Chelsea serving as a backup.

To have a slide posted:

1. Create a slide in powerpoint. Slides show up best in the standard powerpoint size and format
2. Email slide to Sandy and cc Chelsea. Include in the email:
 - a. The date the slide should be pulled down
 - b. Any special considerations (ex: multiple slides that need to be separated)

LISTSERV MANAGEMENT

How to get a Listserv Password:

1. Go to lists.psu.edu
2. On the main page, click "Get a Listserv Password for this Server"
3. Type in your email address and chosen password (this does not need to be your Access Account information) and click "register password".
 - a. Please use your PSU email address. Once you have registered your email address and password, you will have access to any of the lists that have already been linked to that email address.
 - b. Do not use a PSU alias.

How to Change Listserv Owners:

1. Go to lists.psu.edu
2. Go to "Mailing List Management Interface"; "List Management"; "List Dashboard"
3. Click on "Configure" underneath the listserv name

4. Go to "List Maintenance" and under "Owner" you can update the owners and click "Submit"

How to Manage the Listserv:

1. Go to lists.psu.edu
2. Go to "Mailing List Management Interface"; "List Management"; "Subscriber Management"
3. Select the list from the drop down box
4. From here, you can review the members (choose "In Browser" or "By Email") and add, examine, or delete subscriptions

TO ADD AN EVENT TO THE STUDENT EXCHANGE

1. Go to <http://mbastudents.smeal.psu.edu/>
2. Click "login" at the very bottom of the main page underneath the blue bar
3. Login using your Login and Password (You must be granted access by 220 before you can add an event to the exchange)
4. Click "Add an Event"
5. Fill out the information and click "Save". **Please include as much information as possible including dress code.**

******IMPORTANT: Make sure you click the tab "Categorization" and select a category or it will not show up on the calendar.******

6. **NOTE: Do not copy and paste from Word. If you want to copy and paste, copy into a notepad and then paste from there into the event form.**
7. To edit an event, find it in the calendar grid, right click on the event, and select "edit". From there you should be able to make changes to the event. To delete an event, follow the same instructions, but instead of selecting "edit", select "actions" and then "delete"

HOW TO WRITE & POST A BLOG

How to Write your Blog:

Your blog about an MBA event should be 1-3 paragraphs long and the idea is that the style of writing is informal and the content is about your personal experience. Check out examples from other bloggers here:

<http://blogs.smeal.psu.edu/mba/>

At the bottom please also include 1-2 sentences about yourself as a biography- i.e.- what you used to do before business school and what you are concentrating in at Smeal/plan to do after your MBA.

How to Post your Blog:

1. Go to the MBA Blog site: <http://blogs.smeal.psu.edu/mba/wp-admin/>
2. Login using your organization's logon info
3. Click on "Write" from the tabs at the top of the page.
4. Add a title and type your text under "Post".
5. Remember to add your name, bio, and email address at the bottom.

Please follow the format below:

--John Q. Public, jqp1@psu.edu

John received his bachelor's degree from Penn State University in Electrical Engineering and previously worked at EE & Co. At Smeal John is concentrating in supply chain and strategy.

6. Click "Publish" when finished.
7. Email all accompanying photos to cnb5002@psu.edu and Chelsea will have them attached to the page.

EVENT/ACTIVITY PLANNING

The key to a smooth process for planning events or gatherings is ***planning ahead***.

If you need a room for a meeting, event, etc., use the form that is available on the Student Exchange at: <http://mbastudents.smeal.psu.edu/mba-room-request>. Please provide as much information as possible. If you are reserving the Atrium for an event, you must also submit an agenda with your request. A subsequent meeting will be required to finalize details for Atrium requests. Room requests will only be honored if submitted 24 hours or earlier of the event. Please keep in mind that this form is not to be used to reserve rooms for team meetings, conference calls, or to reserve rooms for Graduate Assistant responsibilities.

Once you have a confirmation of space for your event, please update or post your event to the MBA Student Exchange Calendar.

BUDGET

Funds for associations are from two sources:

Dues – Funds that are collected from membership. These funds are maintained with a local bank and can be expended as the membership/board deems fit. Management of funds is maintained by the association.

Funds Allocated from Smeal College – These funds are allocated through the budget office and come from general funding through the state legislature. Funding is on a fiscal year basis, July 1 – June 30; funds do not carryover. These funds cannot be used for gifts or alcohol. These funds are maintained in a budget center managed through Student Services. A ***Student Association Request Form*** must be completed prior to utilization of funds. Utilization of the funds should be discussed with Erik and Susan with regard to appropriate procedures. The most common access will be through use of the purchasing card. These funds are typically used for events, speakers, etc. for the general membership of the association. In general, 220 funds should not be directed toward the purchase or reimbursement of food or beverages.

Funds for each fiscal year are based on the association's activities and judicious spending in the prior year. Each association is required to submit a summary report at the end of the year.

Contracts –

All contracts (i.e., bus rentals, Nittany Lion Inn contracts) must go through our office. No exceptions. Due to liability, we have to abide by Penn State policy. The Financial Officer has limited authority to sign contracts. Most contracts must go through Risk Management. Keep in mind that Risk Management can take up to two weeks to sign a contract depending on the complexity; please plan accordingly.

Caterers-

If an event is being held on campus, then the caterer must be on the PSU Approved Caterer list to procure their services. You can find the list of approved caterers at <http://www.controller.psu.edu/Divisions/RiskManagement/vendors/caterers/>

Alcohol-

Alcoholic beverages are only permissible using dues funds. You cannot use the funds given to your association by administration. Penn State's policy regarding alcohol is very strict. Please see Ann or Chelsea if you are planning on having alcohol on Penn State's property. There is paperwork that is necessary to complete and that process can take up to a month or longer for approval.

PURCHASING CARDS

If you are making purchases with funds given by administration, you can use either Ann or Chelsea's purchasing card. Using this card helps in two ways. One, Penn State is tax exempt and you should not be charged for tax. Two, the charge will automatically come to Penn State and you do not need to use personal funds.

To use the card, please let Student Services know the purpose of the purchase (event, what you are purchasing) and receive approval to use the card - through submission of a ***Student Association Funding Request Form***. We are responsible as the card holder to ensure we are abiding by all of Penn State's policies.

The card, detailed receipt, and names attending event must be returned the next business day. The **Student Association Final Expense Documentation Form** will need to be completed. We only have 2 cards and need to have the card not only for Student Services purchases but have available if other associations need to use the card.

When you use the card please be sure to do the following:

- ✓ Notify the vendor that you are using a Penn State purchasing card and are tax exempt. The Financial Office is becoming rather strict about tax on receipts. If you are charged tax – YOU MUST HAVE IT REFUNDED TO THE CARD. If you turn in a receipt that includes tax, your future use of the Purchasing Card may be restricted.
- ✓ Must obtain a detailed receipt for auditing purposes.

TRAVEL

Air Travel

If you have air travel, please consult with Student Services as Penn State has many policies regarding travel.

Vehicles

The University has rental vehicles (Fleet Operations) which can be used by associations. The only individuals that can drive a university vehicle are Penn State employees. This means that anyone on an assistantship can drive. Keep in mind that when reserving a 15-passenger van, the driver must additionally be at least 25 years old and must pass a quiz on the Fleet Services website.

To reserve a fleet vehicle, please submit a funding request form and additionally submit the following information:

- Type of vehicle (car, van, etc.)
- Number of people in the vehicle
- The user name and ID number
- Destination
- Purpose (detailed information regarding the event)
- Date and time of pick-up and return of vehicle
- Age of individual driving (only if renting a 15-passenger van)

When travelers are using a personal vehicle and claiming mileage, include confirmation of the mileage via MapQuest.

Other Travel-Related Items

- ✓ When attending a conference, provide the conference agenda / brochure for travel backup along with proof of payment
- ✓ Valet parking should only be used in instances where it is the only parking available.

MISCELLANEOUS OTHER

- ✓ If you want to reimburse a guest for travel, please check with Student Services **In Advance** to ensure that PSU can reimburse travel and so that the proper paperwork can be completed.
- ✓ Must have an itemized receipt for reimbursement and must be returned in 15 days of purchase. If you do not turn in the receipt by this time, you are unable to be reimbursed.
- ✓ All printing and copying services in excess of \$250 (per job) must be bid through the Penn State Multi Media Print Center. Contact Student Services if you have a job this big.