

HARVARD



GRADUATE SCHOOL
OF EDUCATION

Office of Student Affairs

Student Activities Manual

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The policies in this manual apply to officially recognized student groups, as well as to all students who wish to plan events at HGSE

POLICIES PERTAINING TO HGSE STUDENT ORGANIZATIONS

What constitutes a student organization?

A student organization is defined as a group of HGSE students who unite to promote or celebrate a common interest. While student organizations may include members from other schools, faculty, staff or community members, the majority of the membership of the organization must be HGSE students. Additionally, only **currently enrolled** HGSE students are permitted to serve as officers/ leaders of officially recognized student organizations.

Why recognize student organizations?

Each organization leaves its special mark on the cultural, social, and intellectual life of HGSE. The school recognizes the vital contributions that student organizations make to the quality of life on campus and seeks to fulfill its commitment to free inquiry and to an education encompassing the whole person.

What are the benefits of official recognition?

Student organizations granted official recognition by the Office of Student Affairs receive benefits that include:

- Eligibility to apply for funding from the Student Organization Fund.
- Permission to publicize, promote, and announce events.
- Permission to use the Harvard name with their organization *under strict guidelines* (please see page 9 for information).
- Event support from the HGSE Office of Student Affairs (OSA).
- Group space within the HGSE Hub Student Engagement platform.

Recognition of Student Organizations

The Office of Student Affairs has the responsibility to grant official recognition to organizations and to establish regulations for their governance. OSA assumes that organizations will comply with the understandings reached at the time of recognition. If OSA determines that a student organization has failed to abide by these criteria or the regulations found in this Manual, it may revoke the organization's recognition. Organizations must register each year with the Office of Student Affairs. OSA will notify the organization if organization recognition is approved or denied.

Recognition of any organization is not to be interpreted as an endorsement by the school of purpose, activities, partisan political position, or point of view of the organization.

GETTING STARTED WITH A STUDENT ORGANIZATION

Considerations for organizing a student organization include:

1. Organize a first meeting of interested students and persons. To the extent possible, organizers should consider scheduling hybrid meetings, with the option to join via Zoom or some other technology that allows for the full participation of all students, residential and virtual.
2. Discuss officers and/or leaders for the organization. Organizations are allowed to select officers through a process of their own choosing, whether election, appointment, or volunteer.

The Office of Student Affairs does not require any specific structure for student organizations. Organizations may have a hierarchical structure with position titles or it may adopt a flat structure with no distinct position titles.

What is the process of recognition or annual reactivation for organizations?

In order for HGSE student organizations to become recognized, the following criteria must be met:

1. Completion of the Student Organization Recognition Request Form, accessible on the OSA website (<https://osa.gse.harvard.edu/student-organizations-0>), which includes a tutorial and submission of the proposed organization's mission statement. Membership of student organizations shall not discriminate on the basis of race, creed, religion, color, sex, sexual orientation, gender identity, physical disability, or any other identity characteristic.
2. Completion of the Student Organization Online Training, which will cover Harvard Trademark, event basics, and financial policies. Before a student organization request can be considered, the student organizer will need to take the online training. A link will be sent to the student organizer upon submission of the Recognition Request Form (Step 1). Once the training has been completed, the student will receive a Certificate of Completion for the training and their request will be reviewed by the Office of Student Affairs.
3. The roster for the organization should include a recommended number of ten (10) HGSE students who are interested in being part of the organization. (Students can ask for an exception, given special circumstances). All organizations must notify the Office of Student Affairs of any changes in contact information for the organization.
4. Acknowledgement of the Massachusetts Anti-Hazing Statutes must be confirmed as part of the recognition process. Organizations are responsible for disseminating this information to members.
5. Observance of all regulations and policies for student organizations, including but not limited to: the use of Harvard's name, proper registration of events, adherence to event planning regulations, including stated funding timelines, any campus restrictions related to COVID-19 and any other policies outlined in the Student Activities Manual.

What is the timeline for recognition?

The registration process must be completed yearly. Recognition begins immediately with the start of the fall semester, and the deadline for recognition is February 28th.

How do I reactivate a group?

To reactivate a group that had existed in a prior year, complete the Student Organization Recognition Request Form, available on the OSA website. The process is similar to requesting a new organization.

Naming your Student Group

The use of "Harvard" alone is not permitted (i.e. Harvard Dance Club). Shortening the name in written or electronic correspondence or on other materials where Harvard Graduate School of Education (or HGSE) is omitted is also not permitted. The Director of Student Affairs will counsel student organizations that need assistance with the use of the Harvard name in their student organization name. "HGSE" will replace the name "Harvard" in any organization that is registered using the name "Harvard" alone.

Responsibilities of the Organization

By applying for and accepting recognition as an official HGSE student organization or group, the officers and members of the group accept responsibilities and organizational requirements deemed appropriate by Harvard University and the Harvard Graduate School of Education.

Officers and members of student groups who disregard these responsibilities and requirements may be subject to disciplinary action. Please note that all HGSE students are held accountable to the Standards of Conduct Statement that is found in the Student Handbook, posted online at <https://www.gse.harvard.edu/students/handbook>

Sponsorship

The University requires that each organization maintain local autonomy, having no institutional connection with outside organizations. This means that non-Harvard groups may not sponsor events by using a student organization as a way to access the HGSE community. Student organizations are the primary hosts and are responsible for the planning, execution, and management of all aspects of events on the HGSE campus or through the use of HGSE technologies. HGSE staff will only interact with HGSE Student Organizations, and not with other clubs at Harvard University or from another school. Violations of policy, practice, or good behavior may affect the standing of the student organization.

All organization members are responsible for understanding and abiding by the policies and procedures outlined in this manual, including those in the Appendix. Student Organization leaders must certify that their organization has agreed to these policies. Organization leadership is responsible for informing group members of such policies and for ensuring compliance. All official student organizations must abide by Harvard University's established policies governing a range of activities, including but not limited to policies regarding non-discrimination, student rights and responsibilities, fundraising, alumni, commercial activities, hazing, and the use of Harvard name and insignia in printed materials, electronic contexts, or merchandise, as outlined herein.

POLICIES PERTAINING TO ALL STUDENT ACTIVITIES

Content of Student Organized Programs

The content of any student organized event should address an academic, cultural or social need. HGSE does not censure student programs, but we do reserve the right to deny funding and the use of HGSE-sponsored technologies if a program is potentially offensive, inciting, and does not align with the mission and values of HGSE and the University.

Policies Affidavit

The event organizer must be aware of the policies of HGSE and Harvard University and be responsible for ensuring that the organization and its activities adhere to the policies listed below:

- Non-Discrimination Policy
- Anti-Hazing Policy
- Guidelines for Inviting Guest Speakers

The following information regarding the Harvard name and trademark applies to ALL student-led activities:

General Information about the Harvard Trademark Program

The Trademark Program is charged with the protection and licensing of Harvard's trademarks worldwide and the administration of the University's internal Use-of-Name policies and guidelines. The office also provides advice to members of the Harvard community on a wide range of trademark-related issues.

In its protection efforts, the Trademark Program registers Harvard's various trademarks and works to stop their unauthorized use around the world. Through its domestic and international licensing endeavors, the Trademark Program licenses the University's trademarks to qualified companies to produce a variety of insignia items. After covering the Trademark Programs' operational expenses, proceeds from the sales of these items help fund student financial aid initiatives of the University.

Use of Harvard's Trademarks by Students and Student Organizations

The Harvard names, insignia, and logos are trademarks of the University and are used by members of the Harvard Community, including student organizations, with the permission of the President and Fellows of Harvard College. Their use is governed by the University's use-of-name policies, which are administered by the Harvard Trademark Program on behalf of the Provost and the University. Those policies' primary Standard of Accurate Representation states that "The University and its members have a responsibility to ensure that any implied association with the University is accurate."

In short, student organizations must make it clear, in all instances and contexts, that they and their related activities are student activities, and not activities of the School or the University as a whole.

Failure of a student organization to abide by the University's use-of-name policies and trademark standards, as set forth in these guidelines, can result in the University's revocation of the use of the Harvard name by the student organization.

Any additional questions should be directed to the Office for Student Affairs (osa@gse.harvard.edu) and the Harvard Trademark Program (trademark_program@harvard.edu).

Student Organization Names

Harvard is comprised of twelve schools, hundreds of departments, offices, and centers, and thousands of students, faculty, and staff. Therefore, a student organization's name must accurately and clearly represent its relationship with the University. This helps avoid confusion and misinterpretation regarding an organization's University affiliation.

The names of all newly-formed student organizations, as well as any student organizations requesting permission to change their name, must satisfy the following criteria:

- Does not use "Harvard" alone in the name (as this is not permitted)
- The name must communicate the general purpose of the organization
- Does not include Fund, Institute, Academy, or Center or other such words as these imply that the organization is an official activity of the School or University

While not required, we recommend that a student organization's name:

- Includes "Harvard Graduate School of Education" or "HGSE" in the name
- Has the word "Student" in the name

All student organization names must be reviewed and approved by the Office of Student Affairs. If the student organization name includes the word "Harvard," it must also be reviewed and approved by the Harvard Trademark Program.

Acceptable Forms of an Organization Name

Student organizations may refer to their organizations in three different ways: the Official Organization Name, the Abbreviated Organization Name, and the Official Acronym. Please review the chart below to understand the differences between the three names and when each should be used:

	Official Organization Name	Abbreviated Organization Name	Official Acronym
Description	Full and complete organization name	Must drop "Harvard," "Harvard Graduate School of Education," or "HGSE" and cannot include "Harvard" in any form	Complete acronym for the Official Organization Name or the Abbreviated Organization Name May not be a hybrid of the Harvard name (spelled out) plus an acronym
Example 1	Harvard Graduate School of Education Student Journalism Club or HGSE Student Journalism Club	Student Journalism Club or Journalism Club <i>Not acceptable:</i> Harvard Journalism Club	HGSESJC or SJC or JC <i>Not acceptable:</i> Harvard GSE Student Journalism Club or Harvard GSESJC or Harvard SJC
Example 2	Association of HGSE Baking Students	Association of Baking Students or Baking Association <i>Not acceptable:</i> Association of Harvard Baking Students, Harvard Baking Association	AHGSEBS or ABS or BA <i>Not acceptable:</i> Harvard BA, Harvard ABS, Harvard GSE Baking
When to Use	Should always be used when representing the organization to the broader Harvard Community and the general public	Only appropriate for use within the context of the College, where there is some familiarity with the group May be used as a subsequent reference after the use of the Official Organization Name	Only appropriate for use within the context of HGSE, where there is some familiarity with the group May be used as a subsequent reference after the use of the Official Organization Name

Changing an Organization's Name

Changes to an approved student organization name should be an infrequent and thoughtful exercise. All changes require approval from the Office of Student Affairs and the Harvard Trademark Program.

When an organization changes its name, the new name must follow HGSE's most recent trademark policy on naming student organizations. It cannot retain any naming conventions that may have predated current naming conventions, but which are inconsistent with current policy.

Logos and the Harvard Graduate School of Education Shield

Student organizations are permitted to use the Harvard Graduate School of Education shield for organizational purposes. For questions regarding shield images, please contact trademark_program@harvard.edu.

Use of other shields, including the University's Veritas shield, is not permitted.

The shield cannot be altered or edited in any way, including modifying the colors of the shield or changing the lettering on the books. Additional design elements may be added around the shield, provided they do not touch, overlap, or otherwise subsume the image.

Student organizations may also create their own shields and logos, provided they are consistent with the University's [Guidelines for the Creation of a New Shield Design or Logo by Harvard Departments, Units, and Officially Recognized Organizations for Themselves or Their Activities](#). These guidelines contain specific instructions for designing a new shield or logo, including design criteria and the proper review and approval process. New or redesigned logos cannot be used before receiving final approval by the Office for Student Affairs and the Harvard Trademark Program.

Articulation of Affiliation

Any time a student organization uses a Harvard trademark, such as the Harvard name or the HGSE shield, it should be made clear that the organization is both student-run and recognized by HGSE.

Some student organizations make this affiliation clear through their name alone by including either (a) "*Harvard Graduate School of Education*" or "*HGSE*" **and** "*Student(s)*" in their organization name.

However, for other organizations - such as organizations who choose not to use "HGSE" in their name, or organizations with historical names that use a different naming convention - the affiliation must be made clear by way of a separate statement called an articulation of affiliation. The recommended phrasing for the statement of affiliation is "a student-run organization at the Harvard Graduate School of Education."

The articulation of affiliation should be placed in a prominent location and in a font size

comparable to other fonts being used, such as directly under the organization's name in the header.

The articulation should appear in any context which includes the HGSE shield or other Harvard insignia. This includes situations where the organization's logo incorporates the HGSE shield.

The articulation should also be used by these organizations in all correspondence with the general public. Contexts where this language should be used *include, but are not limited to*:

- Website and social media accounts
- Fundraising letters, packets, and other solicitations or requests for sponsorship
- event advertising and materials, including event-specific websites and registration pages
- Invitations to speakers
- Invitations to award recipients and other honorees
- Organization-sponsored scholarship materials

Using Student Organization Names and Logos

A student organization's name must be represented accurately, consistently, and in accord with these guidelines in all uses and contexts.

The Trademark Program has established the following guidelines to help student organizations ensure that they represent their association with Harvard in an appropriate and accurate manner:

- All communication external to HGSE, including the general Harvard community and/or the general public, must use the entire student organization name. This includes communication with any other part of Harvard University.
- For communication within the School where there is a reasonable expectation of familiarity, groups may use an approved abbreviation which shortens the name by omitting "Harvard Graduate School of Education" or "HGSE", or an acronym which abbreviates the full, approved name of the student organization. Hybrid acronyms, which spell out Harvard while abbreviating the remainder of the name, are not permitted in any context.

Domain Names and Email Addresses

Before using any form of "Harvard" in a domain name or email address, student organizations should contact both the Student Engagement Team and the Harvard Trademark Program.

The organization's domain name and email address should mirror one of the three acceptable forms of the organization name (Official Organization Name, Abbreviated Organization Name, or Official Acronym). Any significant departure from these acceptable forms, including omissions or abbreviations, needs approval from the Office of Student Affairs and the Harvard Trademark Program.

Additionally, any domain name that includes the word Harvard must be owned by the University and registered to "The President and Fellows of Harvard College." External domain names which do not include the word "Harvard" should belong to the student organization and not an individual.

Website Content and Social Media

In all electronic contexts, including social media and organization websites, student organizations may only use an accurate representation of their full approved organization name, and the appropriate Harvard shield or organization logo. They must also have a statement of affiliation, such as "an official recognized Harvard Graduate School of Education student organization," clearly and prominently displayed.

Student organization **websites** must include the following on the main page of their websites:

- The full, approved organization name in a prominent location, typically in the header of the website. Subsequent references may use an accurate abbreviation or acronym.
- A statement of affiliation ("a student-run organization at the Harvard Graduate School of Education") in a prominent location and in a font size and color comparable to other fonts being used on the website, typically directly under the name in the header or in descriptive text in the body.
- This statement on use of name and Trademark, typically in the footer of the website: "The Harvard Graduate School of Education name and/or shield are trademarks of the President and Fellows of Harvard College and are used by permission of Harvard University."
- Student organizations should accurately represent themselves on **social media platforms** so that anyone publicly viewing a profile can easily determine its relationship to HGSE. To the best of their abilities, the organization must:
- Choose an account name that is an accurate representation of their full, approved name, or an accurate abbreviation or acronym.
- Include the full, approved organization name and a statement of affiliation in the About section
- Include a link to the organizational website in the appropriate field
- Create events through an account linked to the organization, such as an organization's Facebook Group or Page, so that the event connects back to the hosting organization

Student Organization Publications

Student publications must contain the Official Organization Name, without omissions or abbreviations, in the name of the publication. If a student organization wants to use a publication title which does not include their full Official Organization Name, they will need approval from the Office of Student Affairs and the Harvard Trademark Program.

Publications by student organizations must prominently state their affiliation on the cover or front page of the publication. This statement of affiliation must include

1. the full approved name of the organization,
2. that it is a student-run publication, and,
3. the name of the School with which the organization is affiliated.

For example: “a publication of (name of student group), an officially recognized student organization at the Harvard Graduate School of Education.”

The copyright page (or relevant section) of the publication must state: “The Harvard name and the VERITAS shield are trademarks of the President and Fellows of Harvard College and are used by permission of Harvard University.” This statement can be modified to reflect the exact Harvard trademarks being used.

Student Organizations utilizing a website are required to comply with HGSE's Information Technology (IT) policies concerning use of websites.

Student Organization Events and Activities

The use of the name "Harvard" in the name of an event without additional context can create the inaccurate impression that an event is an activity of or is sponsored by HGSE or the University as a whole. Therefore, special care must be taken to create accurate event names.

Since student organizations are recognized through the Harvard Graduate School of Education, “Harvard” in an event title must always be within the context of the phrase “Harvard Graduate School of Education.”

All brochures, posters, publicity materials, etc. related to any student group event or activity, whether taking place in the U.S. or abroad, must clearly identify the full, approved name of the sponsoring student organization, in addition to including a clear statement of affiliation.

Although student organizations can collaborate with offices, departments, or centers on broader initiatives, use of “Harvard” alone in an event title is only permitted when **ALL** of the following are true:

- The program or activity is university-wide, meaning its structure and governance has substantial faculty involvement from at least three separate schools.
- It has institutional accountability in that it reports formally to university-wide officers,

such as the President or Provost or a group of Deans from several Faculties.

- There are not significant issues of confusion with activities elsewhere in the University (for example "the Harvard Project on Government" or "the Harvard Health Project" would raise concerns of this nature).

The phrases "held at Harvard University," "at Harvard University," and "at Harvard" may be used as a general geographic designation for activities held on campus, as long as it is accompanied by language that makes it clear that the activity is being run by a student organization and not the University or any other Harvard school or unit.

Ordering Apparel or other Mercantile Items ("SWAG") bearing Harvard's Trademarks

Any student or student group that wants to have apparel or other mercantile items ("SWAG") produced bearing any of the University's trademarks (e.g., Harvard, Harvard University, Harvard College, Harvard Graduate School of Education, H, HGSE, Harvard Tennis, the VERITAS shield, Harvard school and house shields, etc.), including items bearing a student organization's name that incorporates any of Harvard's trademarks and/or logos, must review the *Guidelines for Ordering Internal Insignia Items ("SWAG") for Harvard Schools, Departments, Units, and Officially Recognized Student Organizations and Affiliates* at <https://trademark.harvard.edu/guidelines-ordering-internal-insignia-items-swag> (regardless whether such items are for use by the student or student group, to give away, or to sell).

When planning to order SWAG products, allow sufficient time for all necessary steps, including departmental review, Harvard Trademark Program review, placing order, and production time.

The Harvard Trademark Program will not review or approve any request until all of the Steps in the *Guidelines* are followed and all of the items outlined in *Step 5* have been completed and submitted to trademark_licensing@harvard.edu.

Per University policy, companies that are not licensed with the Harvard Trademark Program may not produce Harvard licensed products.

Due to the high volume the Trademark Program receives for these types of requests, any questions you may have that are not addressed in the *Guidelines* will need to be submitted in writing to trademark_licensing@harvard.edu.

Please keep in mind that SWAG requests are reviewed in the order they are received, and follow-up questions or an approval may be expected **within 7-14 business days**.

All SWAG designs are reviewed from a licensing perspective to make sure the items and designs are in line with Harvard's licensing standards found at <https://trademark.harvard.edu/pages/domestic-licensing>. They are also reviewed in light of the University's use-of-name policies and, specifically, those policies' primary Standard of Accurate Representation which prescribes that "The University and its members have a

responsibility to ensure that any implied association with the University [through the use of the Harvard name or insignia] is accurate”; <https://trademark.harvard.edu/policy-on-use-of-harvard-names-and-insignias>.

All requests to have Harvard apparel or other mercantile items (“SWAG”) produced must be submitted to the Senior Associate Director of Student Affairs (<https://osa.gse.harvard.edu/>).

For further information about the Harvard Trademark Program, please visit the Trademark Program’s website at www.trademark.harvard.edu or contact the office at trademark_program@harvard.edu.

FUNDRAISING, FUNDING, AND FINANCE MANAGEMENT

Many student activities will require resources. Resources can include in-kind contributions (food, equipment, space, technical assistance); awarded contracts; pledges; sales of tickets or merchandise; and contributions from people, businesses, and/or foundations (restricted or unrestricted). These resources can be obtained both on-campus and off-campus and through proposals, direct mail, endowments, campaigns, events, and sponsorship.

HGSE Fundraising Policies

Students need the permission of the Office of Student Affairs in order to do any fundraising of any kind. This includes raising funds from alumni or other individuals; businesses or corporations; foundations; government grants and contracts; and special events. The first step in securing funding from outside sources is to make an appointment to review your fundraising plan with the Director of Student Affairs. Failure to have this meeting may result in an inability to accept requested donations and/or grants. Note: students do not need permission to seek funds from Harvard entities such as the David Rockefeller Center, HUNAP, Hauser Center, etc.

Before making an appointment in the Office of Student Affairs about your fundraising ideas, you must develop a project budget for the specific program or event you are planning. Project budgets should include both projected expenses and income.

In order to engage in fundraising, students must be part of an officially recognized organization. Individual students are not permitted to fundraise.

The Director of Student Affairs will advise you on how to proceed with your proposed fundraising plan. Students should not plan to use an event as a venue for raising funds. For more information about ticket sales, see the Event section of this manual.

If you plan to contact alumni, individuals, foundations, or corporations, you must first meet with the Office of Student Affairs. Depending on your plans, you may also be required to meet with administrators in the HGSE Development Office. Harvard is an active fundraising organization, and these meetings will ensure that outside organizations and persons do not receive multiple requests from Harvard.

What funding sources are available to HGSE student groups?

- **Student Organization Fund (SOF)**

The Student Organization Fund at HGSE supports student interests and the involvement of student organizations in student life by funding student-initiated activities, programs and events that will enhance and compliment the academic experience of all HGSE students. To this end, the Student Organization Fund (SOF) promotes the academic, cultural and social development of students as part of the co-curricular experience at HGSE.

- **Diversity Innovation Fund (DIF)**

The Diversity Innovation Fund supports student-initiated ideas that broaden the conversation around diversity at HGSE. See the Appendix for DIF proposal guidelines.

Other sources within Harvard:

- David Rockefeller Center for Latin American Studies: www.drclas.harvard.edu
- Harvard University Center for African Studies: <https://africa.harvard.edu>
- Harvard University Native American Program: <https://hunap.harvard.edu>
- Weatherhead Center for International Affairs: www.wcfia.harvard.edu

What are the guidelines for completing a Student Organization Fund Request?

In order to potentially access HGSE funds, student groups must have received official recognition. Student Organization Funding requests should be based on the following criteria. Each organization should consider these factors when drafting a program proposal to the Student Organization Fund:

- The proposal should address an academic, cultural or social need of the HGSE community.
- Anticipated expenditures must be itemized with costs estimated as accurately as possible.
- The objectives of the proposal should represent the most economical and efficient means of satisfying the stated need.
- If outside funding is received for the program, the proposal must be accompanied by evidence of support (financial and otherwise) from individuals, groups, and/or organizations other than the Student Organization Fund.

To request funding from the Student Organization Fund, student groups must submit a Funding Request along with the New Event Request Form through the Groups page within The Hub, providing enough time for the proposal to be reviewed three weeks prior to the event date.

Funding Proposals may be submitted beginning August 30th.

The deadline to submit a proposal for funding through the Student Organizations Fund is 12:00 p.m. on Friday, April 14, 2023.

Proposals will be reviewed every Thursday at noon through April of the academic year, or until the fund is depleted, whichever comes first. Notification of funding decisions will be made by the Senior Associate Director of Student Affairs within two business days of the review meeting.

The Student Organization Fund Committee may invite the student organization Treasurer (or a designated organization representative) to be present for the meeting where the group's proposal is reviewed. This allows for prompt clarification of any questions or concerns that may arise and thus minimizes delays in the funding decision-making process.

Is there a limit on the level of funding a group can receive?

Depending on the number of groups that register each year, the Student Organization

Fund Committee may put a cap on funding for each organization and for each proposal presented. It also recognizes that some groups have traditionally held large-scale community activities for which a greater amount of funding is required. The group(s) holding such activities are encouraged to seek additional funding by co-sponsoring the activity with groups outside of HGSE.

How does one request DIF funding?

In order to potentially access DIF funds, students must complete a short proposal process (see the Appendix for detailed guidelines). DIF Proposals deadlines are:

- October 6th, 2022, 11:59PM (Eastern Time)
- November 3rd, 2022, 11:59PM (Eastern Time)
- January 12th, 2023, 11:59PM (Eastern Time)
- February 9th, 2023, 11:59PM (Eastern Time)
- March 9th, 2023, 11:59PM (Eastern Time)

Is outside funding handled differently?

If a student secures funding from a source outside of the Student Organization Fund or DIF, such as from another Harvard fund, they must meet with the Student Affairs Administrator in OSA to discuss the requirements for utilizing these funds before any money is spent.

Each funding source will have specific guidelines as to how the money can be spent. It is the responsibility of the student to understand and adhere to these guidelines when planning expenditures and submitting payment paperwork to the OSA. Students should inform the Student Affairs Administrator as soon as funding from an outside source is confirmed.

Is approval required for all funding expenses?

Yes. Event organizers are required to get event approval, formally request funding, and receive funding approval before any money can be spent.

Who can handle money?

We recommend as a best practice that only one member of the organization handle all financial transactions.

Cash Receipts

Event organizers should not take cash or checks for any reason.

Can student organizations open bank accounts?

Student organizations may not open bank accounts.

Food and Drink

Food and drink is a valid category of expense for events taking place on campus. Due to financial and logistical concerns, food for virtual events will only be provided on rare occasions. Food and drink as part of a cultural event, a celebration, or at event receptions are considered to be more essential if only to increase attendance and stimulate conversation. Organization leaders must make a compelling case for why food and drink is required for the success of any event, as well as outline the procurement and delivery plan for any food and drink being purchased. Value guideline for food and drink is \$8-9/person. Food for internal group meetings is not covered through the Student Organization Fund.

Who keeps track of the event budget?

Organization treasurers or individual event organizers must create a budget for each event or expenditure, as well as maintain the overall budget. Organization treasurers/event organizers are responsible for monitoring all funding granted to their organization, as well as all expenditures. The same is true for any individual student receiving funding.

Any student group receiving funding from the Student Organization Fund or the Diversity Innovation Fund (DIF) must designate one key contact who will be responsible for handling all financial transactions related to the event.

Is there a University policy on gifts?

Tangible gifts valued at less than \$75 are acceptable tokens of appreciation for invited guests. Gift cards may be purchased as a thank you for invited guests. However, depending on the physical location of an invited guest, there are various policies and regulations that must be considered prior to making any purchase. Event organizers should verify the ability to provide an invited guest with a gift prior to extending any offer.

What if a contract is required?

Students may not sign contracts; contracts are not valid unless signed by an authorized member of the Office of Student Affairs.

Expenditure Timeline

Approved funding must be used within 30 days of event date. Funds that had been granted but are not used more than 30 days from the original event date will revert back to the Student Organization Fund or DIF unless an extension has been granted.

Sales Tax Exemption

HGSE, Student Council, and student organizations are state sales tax exempt, regardless of whether or not your group activity receives funding from the Student Organization Fund. All vendors will receive the following sales tax exempt number or Form ST-5 when confirming any financial transactions: E-042-103-580. Use of the tax exempt number is strictly limited to expenditures for university-related business.

The Office of Student Affairs does not keep budgets for individual organizations.

How are invoices paid?

Vendors should bill the university directly for supplies and services provided. Event Organizers should contact the Student Affairs Administrator in OSA to make other arrangements if vendors are reluctant to do so. Treasurers/Event Organizers must submit outstanding invoices to the Student Affairs Administrator immediately upon receipt. Indicate which funding source will be used to cover your expenses. For example, if you have received funding from both DIF and the DRCLAS to pay for an event, you must track and indicate the breakdown of funding that will cover your expenditures.

What if a vendor requests prepayment?

While direct billing to the university after the event is preferred, some vendors require either prepayment or payment in full on the date of the event. A request for prepayment (or for two checks: a deposit and payment of the balance due) must be accompanied by an official invoice from the vendor on the vendor's letterhead. The invoice must include an itemized explanation of expenses and must specify that prepayment is required. If the vendor is not incorporated, a tax identification number must be included.

Treasurers/Event Organizers must submit outstanding invoices to the Student Affairs Administrator immediately upon receipt and specify which funding source should be used to cover the expenditure. Checks are prepared by the university's central Accounts Payable Office, not by the school.

Requests for prepayments must be submitted to the Student Affairs Administrator several weeks in advance of the date the check is needed. Last-minute requests could result in the cancellation of an event by the vendor. Under no circumstances should a student use personal funds to pay bands, caterers, or vendors.

EVENT REGISTRATION AND EVENT CONSIDERATIONS

Registering an Event

Student event organizers who are not affiliated with a recognized organization but are interested in planning an activity should contact the Director of Student Affairs to discuss their event idea.

For student organizations, first fill out and submit an Event Registration Form through your organization page on The Hub. If funding will be requested, submit a preliminary budget proposal for how the event will be paid for. For full information about funding for student events, see the “Fundraising” portion of this manual.

Event Registration forms will be electronically submitted for approval to the Director of Student Affairs for Event Registration approval. Students must await event approval before moving forward in the planning process.

Once the event has been approved, receive confirmation of your funding from the appropriate representatives (Student Organization Fund, DIF, outside awards) and rework your budget if necessary. (For information about outside sources of funding and regulations regarding fundraising, refer to the financial management section of this manual).

Purchasing Materials

Student organizations who are approved for funding should create an Amazon wish list with all of the materials that are needed to host the event. This list should then be shared with the Student Affairs Administrator, who will place the order. (The Office of Student Affairs has an Amazon Prime account, so all “Prime-eligible” items will be delivered in two days).

When will staffing charges be incurred?

Depending on the scope of the event, staffing may be required to support events. Examples of additional staffing that may incur charges includes captioning for an event and/or additional IT support if the event is large and technically complicated. For on-campus events, additional staffing charges may be applied if the event is outside of normal business hours and/or if there are a large number of anticipated attendees.

*Information Specific to Official University Wide Organizations

- Organizations must have HGSE students as active participants
- Any proposed events would need to be relevant to the HGSE community in particular
- University-wide groups need to abide by HGSE conduct policies and room usage policies.

Accessibility

All events sponsored by HGSE students must be accessible to all those who wish to attend. For special accommodations, you must contact the Associate Director for Student Support Services in OSA. In addition, all publicity should contain wording directing anyone who will need special accommodations to contact the Associate Director.

Publicize the Event

There are a variety of ways to publicize your event to the HGSE community. Events will only be posted for the two weeks prior to the event and will be removed the day after the event occurs. Students should not advertise the event until details such as delivery format, platform, and date have been confirmed.

- HGSE Weekly Newsletter - Sent to students every Monday. To include event announcements, information should be submitted through this online form at least 2 weeks prior to the event date:
https://harvard.az1.qualtrics.com/jfe/form/SV_38cK8MBqaxalwlo
- The Hub - All student organization sponsored events should be posted in The Hub and tagged appropriately.
- If you anticipate that your event will be newsworthy—or if you are planning on inviting the media—please contact Jill Anderson (jill_anderson@gse.harvard.edu) in the Communications and Marketing Office.

Please note: All publicity for an event must adhere to the use of name guidelines outlined earlier in this manual.

Ticket Sales

Student organizations may not charge HGSE students for attendance at any student organization-sponsored event. Organizations may charge members of the community and students from other schools to attend organization-sponsored events.

Registration Software

If ticket sales for an event are required, students should consult with the Director of Student Affairs to have a registration page set up through an internal Harvard system. Students should not set up their own registration pages through Eventbrite or any other registration system.

Disaster Relief, Charity Drives, and Raising Funds for Others

There are times when HGSE students want to collect goods and money to help domestic and emergency relief drives. Without adequate collaboration with an established relief agency that distributes the collected goods, such efforts can be unfruitful. Collaborating with a relief agency can ensure that goods are collected and a means of distribution is available.

Students are not allowed to physically collect cash, checks or any currency. For monetary donations, students are required to identify an established relief agency with a fund-raising platform already established. Checks intended for donation elsewhere cannot be made out to Harvard University or Harvard Graduate School of Education. In addition, students may not establish PayPal accounts on behalf of the university or the student group – this includes a restriction on creating any kind of GoFundMe page or use of a

similar platform. HGSE students are required to obtain permission from the Director of Student Affairs before setting up collection points. If approval of collection of goods and materials is granted, it is the responsibility of the organization to establish a pick-up date for the goods collected. Due to space constraints, donated goods cannot be stored on campus.

Student organizations that raise funds or collect materials to give to other non-profit organizations must exercise care in selecting their recipient organizations. Student organizations are responsible for accurate representation of the recipient organization to the donors and due diligence in seeing that the donated funds and/or materials are used as represented.

Sales, Solicitation, Admission Charges and Raffles

Student organizations planning raffles, sales of subscriptions, tickets to functions, or sales in general, are required to get permission from the Director of Student Affairs.

The City of Cambridge requires a one-day raffle license for raffles or other events where tickets are sold for a chance to win a prize (Massachusetts General Law (MGL) ch.810 Special Acts of 1969). You must also obtain an Entertainment License to hold a party or event for which admission is charged. The Cambridge License Commission is in City Hall at 831 Massachusetts Avenue. Phone: 617-349-6140.

Casino Nights/Poker

Per the City of Cambridge ordinance prohibiting “games of chance,” gambling is not permitted. Because of this city law, the HGSE Office of Student Affairs will not permit any poker tournaments, casino nights, charity benefits or school-wide social events with poker games or other games of chance present.

HGSE does not assume responsibility for anyone who participates in an activity leading to physical injury or property damage. Individuals involved in such activities are fully responsible for their own actions, and are responsible for any damages that occur.

APPENDIX

Invitations to High Profile Speakers, Distinguished Visitors, Heads of State or Government, High American Officials, and Other Leaders

Harvard University regularly hosts distinguished visitors of many different nationalities, backgrounds, and beliefs. In doing so, the University encourages intellectual and educational enrichment while also honoring the principles of free speech and open inquiry that are appropriate and essential to an institution of higher learning.

Before extending an invitation to a high-profile speaker, please review the guidelines provided by the Harvard Marshal's Office on their website:

- [Protocols for inviting Heads of State, Foreign Dignitaries, and Other High-Profile Visitors to Harvard University](#)
- [Guidelines for student organizations](#)
- [Frequently asked questions](#)
- Contact the Marshal's Office (marshal@harvard.edu)

Protocols

The University Marshal's Office must be the first point of contact for any School, department, center, institute, program, or organization that would like to issue an invitation to a dignitary. While many visitors will be invited directly by a school, department, center, student group, or administrative unit, the Marshal's Office provides advice and assistance on matters of protocol and appropriate procedures for issuing such invitations and serves as a central resource and coordination hub. The Marshal's Office can also help sponsoring organizations avoid conflicting invitations. With 13 schools across Harvard, the Marshal's Office tracks invites and can advise about other offers to visit that have been extended or are in the planning stage.

All members of the Harvard community who are considering extending high-level invitations to speaking engagements on campus should keep in mind the following guidelines:

- Prior consultation with the Marshal's Office is required for invitations to incumbent heads of state or government, which must be extended in writing, directly by the President of Harvard. The Marshal must review and approve such invitations in advance, and once approved will liaise with the President's Office on drafting and sending the invitation.
- Any invitation to a head of state or other high-level dignitary to give a public address at Harvard should include explicit reference to the university's expectation that he or she take questions from the audience following his or her address. Typically, a Harvard faculty member will moderate.
- Secret Service protection is mandatory for any foreign head of state or government while on U.S. soil. The Marshal's Office will work with the event sponsor to coordinate security needs for the event. Many other dignitaries require similar levels of security coverage for travel in the U.S. Any associated security costs, which can be considerable, are to be borne by the event sponsor(s).

It is always advisable to consult with the Marshal's Office in advance on invitations to dignitaries or high-level officials, both foreign and domestic, as additional considerations may need to be taken. For example, an invitation to individual(s) actively campaigning for public office at the time of the proposed event would require additional discussion, as would an invitation to an individual who is under investigation or indictment for criminal activities.

Free Speech

Harvard University fully subscribes to the principles of free speech. An excerpt from the Faculty of Arts and Sciences statement of free speech, adopted in 1990 follows:

“Free speech is uniquely important to the University because we are community committed to reason and rational discourse. Free interchange of ideas is vital for our primary function of discovering and disseminating ideas through research, teaching, and learning. Curtailment of free speech undercuts the intellectual freedom that defines our purpose. It also deprives some individuals of the right to express unpopular views and others the right to listen to unpopular views.”

If a student organization is hosting an event where principles of free speech may be compromised, please contact the Office of Student Affairs to ensure that this value is upheld. Contact the Senior Associate Director of Student Affairs with any concerns and/or to seek assistance with controversial speakers or programs. The Office of Student Affairs is also available to moderate events that could be controversial.

Policy on Campaign and Political Activity

The President and Fellows of Harvard College is a registered 501(c)(3). As such, we must comply with the IRS information below.

The Prohibition on Political Campaign Intervention

Under the Internal Revenue Code, all section 501(c)(3) organizations are absolutely prohibited from directly or indirectly participating in, or intervening in, any political campaign on behalf of (or in opposition to) any candidate for elective public office. The prohibition applies to all campaigns including campaigns at the federal, state and local level. Violation of this prohibition may result in denial or revocation of tax-exempt status and the imposition of certain excise taxes. Those section 501(c)(3) organizations that are private foundations are subject to additional restrictions that are not described in this statement.

What is Political Campaign Intervention?

Political campaign intervention includes any and all activities that favor or oppose one or more candidates for public office. The prohibition extends beyond candidate endorsements. Contributions to political campaign funds or public statements of position (verbal or written) made by or on behalf of an organization in favor of or in opposition to any candidate for public office clearly violate the prohibition on political campaign intervention. Distributing statements prepared by others that favor or oppose any candidate for public office will also violate the prohibition. Allowing a candidate to use an organization's assets or facilities will also violate the prohibition if other candidates are not given an equivalent opportunity. Although section 501(c)(3) organizations may engage in some activities to promote voter registration, encourage voter participation, and provide voter education, they will violate the prohibition on political campaign intervention if they engage in an activity that favors or opposes any candidate for public office. Certain activities will require an evaluation of all the facts and circumstances to determine whether they result in political campaign intervention.

Policies on Showing Videos and Films

By law, all motion pictures, pre-recorded videocassettes, DVDs, and electronic media are subject to copyright laws. No films can be rented or purchased from a video store and shown to a group via HGSE platforms without the proper license, even if no admission is charged. Such showings are considered public performances and are governed by the U.S. Copyright Act, which grants the owner of the copyright exclusive rights to the film or video. It is illegal to show films or videos without the proper license. Student organizations considering the screening of a video or film must obtain permission to do so from copyright owners. This should be initiated at least three weeks prior to the planned screening. A sample letter requesting permission may be obtained from the Office of Student Affairs. Students are urged to consult with OSA early in their planning process. Media personnel can be helpful with distributor contact information, however students will need to place the order for film and video rentals directly with the distributor. Students should never order a film unless the rental fees are either in hand or, if support has been requested from a HGSE funding source, officially approved for reimbursement. It is suggested that organization members meet with Media staff at least three weeks in advance of an intended film showing.

All video requests should be for closed captioned videos.

Violation of the copyright law is a federal crime and is subject to substantial fines and/or a jail term. Harvard University will not defend or be responsible for fines imposed on an individual or individuals who violate the law.

Please Note: Any films that will be shown for educational purposes are not subject to the above copyright laws.

Diversity Innovation Fund: Funding Proposal Guidelines

Recognizing that students have ideas for programs or activities that would enhance HGSE's attention to diversity, the Diversity Innovation Fund (DIF) supports, with small grants, student-initiated ideas that broaden the conversation at HGSE and allow for more varied perspectives, experiences, and forums for exchange. This fund is available to students through a short proposal process.

Application Process:

Proposals can be submitted electronically on the Student Affairs website. There are four submission deadlines each academic year. The deadlines to apply for funding are October 6th, November 3rd, January 12th, February 9th, and March 9th. Please allow up to three weeks to receive a response to a proposal. Accordingly, the scheduling of your event should take this timeline into consideration.

Proposals should be no longer than three typewritten pages, and must include the following:

- A contact at HGSE, including email
- Detailed description of proposed program/activity, including: proposed date, time, location and expected attendance. All proposals must include a line item budget.
- Listing of individuals responsible for planning and implementation, highlighting relevant expertise and prior experience, if appropriate.
- Statement of purpose describing how and why this activity will broaden the conversation around diversity at HGSE.

Program Guidelines:

1. In the interest of broadening the conversation on diversity, proposals should clearly address how the project will engage students across programs and interests. Events must be widely publicized and open to the entire HGSE community. If space for an event is limited, at least half of the seats must be

available to members of the HGSE community.

2. Within two weeks of the conclusion of the event, sponsoring groups must submit a formal report to the Office of Student Affairs outlining how the event met the goals outlined in the Statement of Purpose. All outstanding receipts and reimbursement requests must be submitted with the final report.
3. Activities must be student-initiated and have an educational component. Events that are primarily social in nature will not be funded.
4. In the spirit of the Fund's key emphasis on innovative programming and activities, priority will be given in the funding of new initiatives.
5. Events must not have scheduling conflicts with other school-wide HGSE-sponsored events.
6. Diversity Innovation Fund grants may not be used for honoraria. However, they can be used for travel costs for guest speakers.
7. Diversity Innovation Fund grants may not be used for groceries, catering, or other food expenses.
8. The average award to students for activities ranges between \$300 and \$800. If the request is greater than \$1,000.00, it is highly recommended that you meet with the Assistant Director for Diversity and Inclusion in advance of submitting a proposal. No award will be granted in excess of \$2000.00.
9. Once granted an award, event leaders and organizers must attend a student training session with the Student Affairs Administrator on HGSE Fiscal and Event Planning before initiating the planning process.
10. All funded activities must conclude no later than April 30th. Receipts for reimbursements and financial requests must also be turned into the Office of Student Affairs by this date, with accompanying paperwork.