**Definition**

This policy applies to non-student employee organizations. The affiliation of California State University San Marcos with organized members of the community is one method by which the campus fulfills its mission. Cal State San Marcos welcomes the opportunity to develop such relationships that recognize its values and vision, and enhance the learning experience of its students. Students of Cal State San Marcos may organize based upon mutual interests and goals under the auspices of the Office of Student and Residential Life and the California State University San Marcos Associated Students, Inc. Non-student organizations that desire to be affiliated with the campus may organize under the sponsorship and guidance of a campus college or department. Approval to sponsor a non-student affiliated organization must be requested in writing on an annual basis by an officer of the organization and the sponsoring college or department, endorsed by the division, college or department’s division Provost or Vice President, and then forwarded to the Chief Financial Officer/Vice President Finance and Administrative Services (CFO/VPFAS) or designee. It is the CFO/VPFAS’S responsibility to bring the request forward for the President for consideration and decision. In seeking such a relationship, each organized group will also acknowledge and accept the responsibilities associated with their formal recognition as an affiliated member of the campus community. Individuals, groups or organizations that have not been officially recognized by the University may not use the University’s name, seal, logo or any other symbol adopted by the University, including landmarks or variations of any of these, to promote themselves or their activities nor may they use the University’s facilities or services, or in any way associate themselves with the University.

**Authority**

By the authority of the President of California State University San Marcos; Executive Orders 849 and 715; Title 5, Sections 40050, 41600, 41700 et seq, and 42200 et seq.

**Scope**

The policy and subsequent procedure apply to all areas of the campus community and to all non-student organizations seeking affiliation with the campus. The process is managed by the Chief Financial Officer/Vice President Finance and Administrative Services or his/her designee. Revisions to agreements with affiliated organizations are the responsibility of Procurement and Contracts, and will be reviewed by the CFO/VPFAS. The President has sole decision authority to approve agreements with affiliated organizations. This policy does not apply to President’s advisory councils.

Karen S. Haynes, President

7/16/04

Approval Date
I. INTRODUCTION

Affiliations with non-student employee organizations can be an integral element to California State University San Marcos’ ability to achieve its mission. Affiliated organizations also present unplanned exposure to the campus for various forms of liability. In order to provide opportunities to develop relationships with interested members of the community and continue to meet its responsibilities to the Trustees of the California State University, the following procedures are established in support of the campus policy concerning affiliated organizations.

II. DEFINITIONS

A. Affiliate - An Affiliate is a non-student employee organization that is formally recognized by the campus. The university will not recognize any organization that does not obtain formal designation as an Affiliate, and will not support or participate in their activities.

B. Campus Sponsor - A faculty member or manager of a college or department, who on behalf of the campus, agrees to assume responsibility for developing and maintaining a relationship with a prospective Affiliate. In doing so, the college or department faculty or manager assumes sponsorship of the Affiliate and must work with the Affiliate to seek formal campus recognition in order to further the group’s purpose. The Campus Sponsor must also maintain an ongoing relationship with the Affiliate throughout the year, and assist the Affiliate in maintaining a good working relationship with the University.

III. PURPOSE OF AN AFFILIATE

The purpose of a CSUSM Affiliate is to support the values, vision and mission of Cal State San Marcos and its colleges and departments. Any college or department faculty member or manager considering entering into a relationship with an organization is responsible for ensuring that the purpose of the organization meets this requirement.

IV. FORMAL DESIGNATION

Interested organizations must formally request designation as an Affiliate. The steps for an organization to initially obtain an Affiliate designation are:

- Identify and gain agreement from a college or department faculty member or manager to act as a Campus Sponsor for the proposed Affiliate group.
- Prepare and submit an Affiliate Recognition Form (ARF), organization’s bylaws or operating rules, and any other required documentation to the sponsoring division Vice President. The Vice President will forward endorsed Affiliate applications to the CFO/VPFAS designee, the Director of Procurement. On behalf of the CFO/VPFAS, The Director of Procurement will request a risk assessment from Risk Management and Safety and a review of the request by the University Controller as part of the application process. The completed application will be forwarded to the CFO/VPFAS for review and recommendation to the President.
Upon determination by the President, the organization will receive written notice from the CFO/VFAS regarding the request for Affiliate status. Affiliate status is awarded for one year at a time. Each June, Affiliate status must be renewed for organizations who wish to continue affiliation with the University. Should the Affiliate lose the support of the Campus Sponsor, the organization must secure a new Campus Sponsor before applying for renewal or continuing its activities.

V. AFFILIATE RESPONSIBILITIES

The responsibilities of an affiliated organization include, but are not limited to, familiarization and compliance with any campus policies and procedures that are pertinent to the organization’s activities; obtaining approval for each use of the campus name in publications, advertisements, notices, and written materials; and promoting activities that are in support of the campus’ vision, values, and mission. Any financial activities, including the establishment of banking or other asset management accounts by an affiliated organization, must be set up and monitored in conjunction with the University Controller’s office to ensure the integrity, consistency and accountability of all financial transactions. In addition, an affiliated organization must indemnify the university against any liability created by their actions.

A. Obtain and Identify a Campus Sponsor; Members of the campus community encounter various interest groups that may desire to associate and participate with the campus in achieving its goals. These relationships develop based upon mutual areas of interest that should be associated with a particular college or department. It is the prospective Affiliate’s responsibility to obtain a willing and appropriate Campus Sponsor.

B. Request Affiliate Designation. Campus Sponsor and representative from the non-student organization will complete and submit Affiliate Recognition Form (ARF) for approval by the Sponsor’s division Vice President. The form provides information concerning the purpose of the Affiliate, its officers or primary representatives, its planned activities, and identifies the sponsoring college or department. The Affiliate Organization bylaws or operating rules shall include the following information:

a. Affiliate Name.

b. Purpose.

c. Identification of any relationship with a local, state or national organization.

d. Membership qualifications, including a statement prohibiting unlawful discrimination, harassment (or allowing harassment) on the basis of gender, race, color, ancestry, religious creed, national origin, sexual orientation, physical disability (including HIV and AIDS), mental disability, medical condition, age (over 40), or marital status.

e. Acknowledgment and acceptance of the responsibilities associated with the Affiliate’s formal recognition by the campus, including compliance with the policies and regulations governing the campus. This acknowledgement and acceptance must be done, in writing, on an annual basis as part of the renewal process.
f. Titles and contact information for its officers; their terms, including how a vacancy in any office will be filled; the duties of each officer; and, how nominations are made for office and how members will vote, including qualifications for voting privileges.

g. Meeting schedule for regular meetings, including time and place, if known; who may call special meetings and how members will be notified.

h. Specify quorum and any attendance rules.

i. Identify any standing committees and their purpose and duration, if known.

j. State any dues and/or other fees collected by the Affiliate. If none, state so.

k. Specify who may request and originate an amendment to the bylaws or operating rules; method or presentation to the organization; necessary votes required to adopt; and the time of effectiveness, i.e., 30 days hence, immediately, etc.

C. Annually, and in writing, as part of the renewal process, a hold harmless/indemnity statement must be filed with the campus. The hold harmless/indemnity statement will read:

“(Affiliate) shall indemnify and hold harmless the State of California, the Trustees of the California State University, the University, including California State University San Marcos, their officers, employees, representatives and volunteers from and against all claims, damages, losses and expenses including attorney fees arising out of the activities described herein, caused in whole or in part by any negligent act or omission of (Affiliate), any contractor, any subcontractor, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, except where caused by the active negligence, sole negligence, or willful misconduct of California State University San Marcos.”

VI. CAMPUS SPONSOR RESPONSIBILITIES

A. The Campus Sponsor is a faculty member or department manager (MPP). The Campus Sponsor is the primary contact for the Affiliate and serves as the liaison between the campus and the Affiliate on behalf of the college or department. This individual plays an active role in the endeavors of the Affiliate and is responsible to maintain an ongoing relationship Affiliate throughout the year.

B. The Campus Sponsor communicates campus guidelines to the Affiliate. The campus’ Chief Financial Officer/VPFAS, the Associate Vice President, Finance and Business Services, and the California State University San Marcos Foundation are some of the offices which may provide specific guidelines based upon the Affiliate’s endeavors.

C. The Campus Sponsor will notify the division Vice President, the Affiliate, and the campus’ CFO/VPFAS designee, the Director of Procurement, if they can no longer serve in an active role with the Affiliate.
1. The loss of campus sponsorship will immediately suspend the relationship between the campus and the Affiliate until such time as the Affiliate can identify another sponsor. The new Campus Sponsor and Affiliate will amend the Affiliate Recognition Form to identify the new Campus Sponsor and send it to the Sponsor's division Vice President. The division Vice President will forward the endorsed amended Affiliate Recognition Forms to the CFO/VPFAS designee, the Director of the Procurement. The Director of Procurement will forward completed requests to the CFO/VPFAS.

2. The CFO/VPFAS, after consulting with the appropriate division Vice President and the University President, will notify the Affiliate, in writing, of the campus' decision to continue the relationship with the assistance of another sponsor, or to end the association.

VII. DECISION TO RECOGNIZE AN AFFILIATE

A. Sole Discretion

Cal State San Marcos has sole discretion for designating an organization as an Affiliate. The campus President grants or withholds approval of all affiliate recognition requests.

B. Process

1. The Campus Sponsor and Affiliate representative are responsible for completing the Affiliate Recognition Form application. The Campus Sponsor will recommend a non-student organization’s request for Affiliate status to the division Vice President.

2. The Sponsor’s division Vice President is responsible to determine if there are sufficient resources, both human and financial, for a college or department faculty member or manager to serve as the Affiliate’s sponsor. The Division VP’s endorsement of the proposed Affiliate’s requests for campus status constitutes the approval of the Sponsor to act in that capacity within existing resources. The Division Vice President will forward requests he/she endorses to the CFO/VPFAS designee, the Director of Procurement.

3. On behalf of the CFO/VPFAS, the Director of Procurement will request a risk assessment from Risk Management and Safety and a review of the request by the University Controller as part of the application process. As a condition of the recognition of an Affiliate, the campus may require the Affiliate to obtain and maintain various forms of insurance coverage based upon a risk assessment completed by the Office of Risk Management and Safety. On behalf of the CFO/VPFAS, the Director of Procurement will request an initial risk assessment. This will normally take less than ten (10) business days to complete. Although other risk management techniques may be required, on a case-by-case basis, the most frequent technique will require loss exposures to be covered by one or more insurance policies. Among the types of insurance coverage that may be required are general public liability insurance, workers’ compensation insurance, special event insurance, and vehicle insurance. As with all campus activities, individual
events sponsored by the Affiliate may require a subsequent risk and insurance assessment.

4. Risk Management and Safety will send a copy of the risk assessment response to the Campus Sponsor, the sponsoring division Vice President and the CFO/VPFAS designee, the Director of Procurement. Once risk and insurance issues are resolved, the Director of Procurement will complete the application and forward it to the CFO/VPFAS.

5. The CFO/VPFAS will review the Affiliate request with the President based upon the recommendation of the sponsoring Vice President, the risk assessment, and the Affiliate’s ability to support the values, vision and mission of Cal State San Marcos and its colleges and departments. Once determination is made by the President, the CFO/VPFAS will notify the Affiliate of the determination.

C. Written Notice

No organization may represent itself as an Affiliate, or as having a relationship with the campus, prior to receiving notification of the written approval of the campus President. The CFO/VPFAS will sign and return a copy of the Affiliate Recognition Form which will serve as the written approval notice.

D. Not Recognizing an Organization as an Affiliate

Among the reasons an organization may not be recognized are: recognizing an organization as an Affiliate creates a conflict of interest for the campus, the benefits of recognizing an organization as an Affiliate do not outweigh the potential liability of the relationship, or the Affiliate does not comply with the campus’ policies and regulations or the purpose of the Affiliate is not congruent with the University’s values, vision, or mission.

VIII. MONITORING AND ANNUAL REVIEW

A. Affiliate Responsibilities

It is the Affiliate’s responsibility to regularly apprise its Sponsor of its activities, including potential issues that may affect its relationship with the campus and/or members of the campus community. If any changes to its bylaws, operating rules, or other governing regulations when approved by its officers and/or its members, it is the Affiliate’s responsibility to immediately notify the Campus Sponsor and the University’s CFO/VPFAS. The Affiliate and the Campus Sponsor will notify the University Controller of any changes in its financial or banking relationships.

B. It is the responsibility of the Chief Financial Officer /Vice President for Finance and Administrative Services, or his/her designee, to monitor the Affiliate application and renewal process. Director of Procurement, Contracts, and Materials
Management is the Chief Financial Officer’s designee to manage this process. The renewal process will include:

1. Submittal of the Affiliate Recognition Form By-laws and any other requested documentation to the Division Vice President. The Division Vice President will forward Affiliate requests endorsed by the Vice President to the Director of Procurement.

2. The Director of Procurement will review the request with Risk Management and Safety and the University Controller, to address and resolve any outstanding issues of risk and financial information. The completed requests will then be forward CFO/VPFAS who will present the request to Cabinet to review the Affiliate’s performance over the past twelve (12) months.

3. Cabinet will assess the advantage/s of an ongoing relationship, and make recommendation to President.

4. President will decide status and direct CFO/VPFAS to notify the Affiliate.

IX. Cessation of Recognition of an Affiliate

Affiliate recognition may cease due to the decision of the Affiliate, the campus or both. In all cases, the Sponsor and the Affiliate’s designated representatives will work the Chief Financial Officer designee to insure that all assets and records of the Affiliate are disposed of in accordance with appropriate business practices and in lawful compliance with the Affiliate’s relationship with the University.

A. Decision of the Affiliate – Notice is to be given, in writing, to the Sponsor no later than 30 days prior to the cessation of the Affiliate’s activities. The notice is to include the reason for the decision by the Affiliate.

B. Decision of the Campus – The CFO/VPFAS or his/her designee, will give written notice to the Affiliate no later than 30 days prior to the date the campus decides it is in its best interests to end the relationship. Within reason, but at its own discretion, the campus may require immediate cessation of its relationship with the Affiliate and the Affiliate’s activities. In such instances, communication of this action may be done electronically or telephonically, followed by a written notice. The notice will include the reason for the campus’ action. Reasons for immediate action may include, but are not limited to, non-compliance with the campus’ policies and regulations, illegal activities, other legal considerations, or financial considerations.

C. Decision of Both – The mutual decision to end the relationship between the Affiliate and the campus will be recorded in writing and signed by the Affiliate, Campus Sponsor, the division Vice President, and the Chief Financial Officer/Vice President Finance and Administrative Services. In all cases, the CFO/VPFAS and appropriate division Vice President will be involved in the decision to end Affiliate status. The
CFO/VPFAS or designee will be responsible for working with Affiliate and Campus Sponsor to complete the steps to end affiliation status.