STUDENT ORGANIZATION ADVISOR TRAINING

Dustin Lewis (he/him)
Associate Director
• All Financial Forms have moved online into EngageXU
  • Exception: Deposit Form

• Forms will continue to evolve as we work with the Controller and Procurement to roll out some additional products from US Bank this fall
  • Trainings will be updated and additional information will be emailed out

• Advisors are involved through Workflow in EngageXU to approve any expenditures
  • Workflow Approval emails come from mailer.campusgroups.com
Office of Student Involvement staff serve as the Budget Administrators for all 81**** funds, also known as student club funds.

Financial Spending Workflow:

1. **Students Initiate Expenditure (EngageXU)**
2. **Advisor Approves Expenditure (EngageXU)**
3. **OSI Verifies & Authorizes Expenditure**
4. **Financial Admin Executes Expenditure**

(You)  (Them)  (Me)  (Bursar Accounts Payable Purchasing)
**FINANCIAL PRACTICES & POLICIES**

**Student Organization Purchase Form**
- Order items from Amazon
- Order office supplies from Office Depot
- Used to pay vendors
  - Ask for a quote / contract
  - Ask for a W-9 form (IRS)
- Reminders: For students that you’re paying or hiring, they have to be setup for student employment. You can’t hire a student graphic designer or dj with this form.
Student Organization Student Reimbursement Form

- Students can be reimbursed for purchases up to $300 in cash from the Bursar. Over $300 is reimbursed via check but uses this same form.
- You must upload receipts
- We cannot reimburse for Sales Tax
- Advisors will use a separate form
Student Organization Student Cash Advance Form

- Organizations can withdraw up to $300 of cash at a time.
- Cash may be used to purchase goods but students must return receipts along with unspent cash to the Bursar.
- Vendors cannot be paid in cash for any type of service or contractual performance. This includes payment via giftcard.
- Services, including students performing a service such as DJ or graphic designer, cannot be paid in cash or giftcard.
- Cash returns should be submitted within 5 business days.
Online Accounting Book Review – EngageXU

Log onto xavier.edu/engagexu

In the group’s page, select the “Accounting Book” (you must be an Officer to view)

<table>
<thead>
<tr>
<th>Budgets</th>
<th>Allocations/Revenues</th>
<th>Expenses</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY21</td>
<td>$533.17</td>
<td>$0.00</td>
<td>$533.17</td>
</tr>
<tr>
<td>Group Funds</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$533.17</strong></td>
<td><strong>$0.00</strong></td>
<td><strong>$533.17</strong></td>
</tr>
</tbody>
</table>

Current Balance (Updated Daily from Banner)
Contract Signature Authority

Many organizations will request to enter into a contract or legal agreement at some point throughout the year. Many contracts need to be routed for signature through Student Affairs.

Student Organizations, receiving their authority and finances from within Student Affairs, are subject to the policies as defined within the Provost area. Performance Agreements should be used to contract performers / lecturers. Any performer contract under $5,000 can be executed by Student Involvement. Under $10,000 can be executed by Student Affairs. Over $10,000 will require signature from the Provost. Please work with Student Involvement when contracting any artists or performers.

Realistically, expect delays for any contract routing over $5,000.
Contract Signature Authority, continued
Advisors are permitted to enter into facility-use agreements.

Advisors can enter into contracted services such as catering, equipment rental or similar.

Advisors can enter into event rentals. When it comes to renting inflatable or novelty equipment, the club should work with Student Involvement to ensure that necessary risk and liability paperwork is made available when necessary for events and activities.

When in doubt, just ask. Work with advisors and our office to ensure that you have plenty of time!
Fundraising
Student Organizations are required to register all fundraising activities, including:

• Sales to members (tshirts or club gear)
• Sales to individuals outside of the club (including those outside of Xavier)
• Letter-writing campaigns
• Dues Collection
• Working an event in an effort to generate revenue (such as concessions at a game)
• Collected donated items for charity (such as disaster relief or food donations)

Student groups are prohibited from selling homemade baked goods.

When fundraising for charitable/philanthropic purposes, the organization needs to carefully track any funds raised and is responsible for processing the entire donation as a payment to the charity through the university.
**Zelle**
We are in the process of bringing on the Zelle product to replace Cash Reimbursements. Students will soon be able to receive their reimbursement via Zelle on their phone (similar to Venmo but powered by US Bank).

**Payments in EngageXU**
EngageXU will soon allow students to sell items, collect dues and charge admission/tickets for events all through the online system. Look for more information soon!

**Instacard**
We are about to launch a new product where student organizations can get an advance to spend with a digital credit card – issued for a particular event, trip or purchase. There will also be an option to have a temporary credit card issued to you for approved spending – in particular when a digital card may not be accepted.
Student organizations are required to submit their events (including meetings) through EngageXU. Per the Campus Events Guidelines with COVID-19, groups should be tracking and entering attendance for any in-person activities into EngageXU to support contact tracing if needed.

The new Events form in EngageXU also is a more robust and efficient way for groups to reserve certain spaces or to request permission for a variety of events and activities.

- Events with large audiences
- Events that involve political or lobbying activities
- Events where alcohol may be available
- Events that include a public speaker or performance group
- Events that involve a protest, rally, or form of public demonstration
- Fundraisers (collecting money, selling tickets, etc.)
- Tabling
- Outdoor Reservations & Postings (chalk, signs, flags)
Outdoor Space
To reserve Outdoor Space, student orgs should create their event in EngageXU and indicate in the event form that they wish to reserve outdoor space. Any tabling must be done outdoors this year to encourage social distancing and to reduce density in high traffic areas. This includes outdoor postings such as signs and flags or other displays.

Fenwick Place Atrium
This semester, Fenwick Place cannot be reserved or used for tabling of any kind.
• Blend of in-person, online, and hybrid options
• Follow established social distancing protocols
  • Event capacity will be limited
  • Participants are expected to wear masks at all times, except when eating
  • Participants are expected to maintain 6-feet social distancing
• All student activities should be registered via the event submission process in EngageXU
• Attendance should be taken at all in-person student activities
• Where possible, students should pre-register for events
• Event organizers are responsible for following and enforcing protocols
• Advisors must be present for in-person events
EVENT CAPACITIES

• General Rule
  • an overall density reduction of 50%, and
  • six-feet social distancing between attendees

• Indoor Events
  • In most circumstances, total indoor event capacity = 50 participants
  • Special events may be allowed a maximum capacity of 300 attendees

• Outdoor Events
  • Given the reduced risk of transmission outside, maximum capacity may be up to 300 attendee at one time

• Exceptions
  • Need approval from COVID task force

• Online Resource – Meeting Spaces & Capacities
• Use pre-packaged or individual servings of food / beverages
• No self-serve buffet or beverage stations
• No homemade goodies, even if individually wrapped
• Catered meals may be provided
  • Recommend the use of Chartwells for catered meals
  • Use of other catering options should be limited to those vendors which demonstrate compliance with food safety protocols
• Have hand sanitizer available – OSI can checkout sanitizer stations to groups
• Use disposable items; individually wrapped preferred
• Event organizers are responsible for following protocols
Guest / visitor = any non-student or non-employee
  • Family members, speakers, volunteers, drop-in visitors, ministers/coaches, vendors, tour groups, alumni, program participants

Permitted if they follow Xavier’s social distancing guidelines:
  • Guests / visitors must wear a mask, and
  • Guests / visitors must maintain 6-feet social distancing

Should have a host who is responsible for explaining guidelines

Host are encouraged to explore virtual options and should attempt to limit guests

External rentals / space use is strongly discouraged
Off-Campus Travel & Activities Form
Any request to travel should be submitted through this form.

COVID-19 Guidelines
• 35 mile distance from campus
• Day trips only – no overnights
• Destinations must comply with university guidelines – masks, density of crowds, distancing
• Transportation should operate at 50% capacity (or 50% of seat belts)
• Exemptions can be requested but will need a strong argument to be granted. Safety comes first!
University Protocol for Campus Public Speakers and Events

When hosting a public speaker or event, student organizations must have approval before advertising and hosting a speaker or lecturer. This request requires approval from Student Involvement, Student Affairs and the Provost. Approval starts with an Event submission in EngageXU.

Controversial events will not be denied on the basis of controversy but will be considered on how the university may best prepare a response.

Academic Freedom does not, inherently, apply to student organization events, however, a club can collaborate with either a professor or Academic Department.
Student Lobbying, Political and Campaign Activities Policy

Due to the University’s designation within the IRS, the university is limited in its ability to participate in political campaigns. Student organizations have the opportunity to participate in certain kinds of lobbying and political campaign-related activities. The University cannot be seen as endorsing any political candidate or party.

Begin all planning for political activities by submitting events in EngageXU – reviewed by the Office of Student Involvement, who will consult with Government Relations.
Hosting Student Events with Alcohol

Events where alcohol is to be served require permission, per the Alcohol & Other Drugs Policy. Event requests must be submitted several weeks in advance of the program.

Primary concerns for receiving approval include:

- The consumption of alcohol may not be the focal point of the activity; the event must clearly have other primary entertainment or educational functions
- The majority of attendees must be over the age of 21
- The advisor must be present for the duration of the event
- The advisor must take responsibility for ensuring policy enforcement
- Events must take place between 12pm-1am
- Non-alcoholic beverages and food must be provided, free of charge
- On campus events must use Xavier Catering / Chartwells
- Security is required
Final Day for Campus Programming
The cut off each semester for student events is on the Friday before finals week at midnight. Campus events can resume once finals have officially ended for the semester.

Gambling Policy
In short, money cannot be exchanged for betting, split the pot, or cash prizes with a raffle.

Brand Use
All apparel or promotional items should be submitted for approval to Marketing & Communications via the Promotional Materials & Apparel Approval Form in OrgSync. Student organizations are limited to using either the official university brand or secondary.
Motion Picture Copyright Policy
Copyright law prohibits a student organization from screening a feature film or documentary without a public license.

Educational exemptions are limited to when an instructor uses the film as part of their regularly scheduled course and when the attendance is limited to students enrolled in the course.

The university has some options available such as Kanopy through the Library as well as SpectrumU (app). Additionally, Netflix Original documentaries do not require a license.
HOW CAN ADVISORS BEST SUPPORT?

• Meet regularly or at least check-in with your organization
  • Some groups are more hesitant than others about how they can continue to operate during COVID-19 but it is important that we navigate creative ways to deliver campus life

• Pay attention to EngageXU and Workflow Approvals
  • The more active your organization may be, the higher volume of email approvals

• Participate with the group, more than ever, in planning and supporting their events – offering creative solutions in a complex time
  • Advisors are required to be present at in-person programs to help model and encourage students to hold each other accountable for social distancing

• Ask for help or guidance if needed