

# Fall 2022 Student Organization Workshop

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STUDENT INVOLVEMENT  
GALLAGHER STUDENT CENTER  
COMMUTER SERVICES

# Meet Our Team



**Leah**  
Busam Klenowski



**Dustin**  
Lewis



**Deb**  
Ekeke



**Sophie**  
Stewart



**Jill**  
Finch



**Ryan**  
Spolar

# The Mission

We believe that through involvement, individuals **discover** their passions and **develop** their strengths to **lead** a purposeful life.

# Finances

- Student Activity Fee
- Funds & Accounts
- Accounting Book
- EngageXU Forms
  - Payment Advances
  - *Pre-Spend Authorization*
  - Reimbursements (Zelle)
  - Purchases (vendor and other payments)
- Workflow Approvals
- Donating Funds
- Contract Signature Authority

Accounting Book								
Budgets	Allocations/Revenues					Expenses		
FY22	\$4,233.90					\$1,086.00		
Group Funds	\$0.00					\$0.00		
<b>Total</b>	<b>\$4,233.90</b>					<b>\$1,086.00</b>		

Transactions (3)								
#	Item Name	Entered By	Source	Payee / Vendor	Category	Payment Method	Receipts	Status
1	101001 Claim On Cash Beginning Balance - #2474510 Jul 1, 2021	API Created Art Society	FY22	-	-		-	Completed
2	801130 Agency Initial Allocation Fy22 - #2475597 Jul 1, 2021	API Created Art Society	FY22	-	-		-	Completed
3	805130 Agency Recaptured Funds Fy21 - #2475339 Jun 30, 2021	API Created Art Society	FY22	-	-		-	Completed

# Student Activity Fee

Every undergraduate contributes:

- \$115 per semester (full-time)
- \$12 per credit (part-time)

SGA allocates the Activity Fee:

- UAOs & Subordinate Bodies Allocations
  - SGA Executives
- Club Budget Allocations
  - SGA Student Organizations Committee (SOC)



# Funds & Accounts

Every organization has a fund number

- Six digit number beginning with 81xxxx
- Unique to your organization

EngageXU > Group > Settings > More >  
Student Org Fund Number

- Needed for any financial form to be submitted on EngageXU
- Needed for depositing funds at the Bursar's Office

# Accounting Book

Connected with the university's Banner system – Xavier's official record system.

EngageXU > Group > Accounting Book

Only Officers (admins) can access the Accounting Book for your group.

Adjust [Permissions](#) if you want to further limit access to any Officers.

Use [Show Archived](#) to view previous years' allocations, revenue and expenses.

Accounting Book					<a href="#">Show Archived</a>	<a href="#">Upload Transactions (Admin Only)</a>
Budgets		Allocations/Revenues		Expenses		Balance
FY22		\$4,233.90		\$1,086.00		\$3,147.90
Group Funds	<b>Current Balance</b>	\$0.00		\$0.00		\$0.00
<b>Total</b>		<b>\$4,233.90</b>		<b>\$1,086.00</b>		<b>\$3,147.90</b>

# Student Payment Advance Form

- Organizations can take out **one advance at a time**, up to \$300 in total. This year it will be a Focus Blue card.
- The individual listed on the advance is **responsible for** the advance.
- Advances will only be considered for **fully-approved events**, submitted through EngageXU.
- The Focus Blue card may be used to **purchase goods**. You cannot pay performers, individuals for services, or use Focus Blue for rentals.
- Students must **return receipts** along the Focus Blue card to the Controller's Office (Schmidt Hall) within 7 days.
- Your organization is responsible for tracking and **maintaining receipts** with an advance. Missing receipts will not be accepted.
- Students that are listed on the advance will personally be charged for advances that are not closed in a **timely manner**.

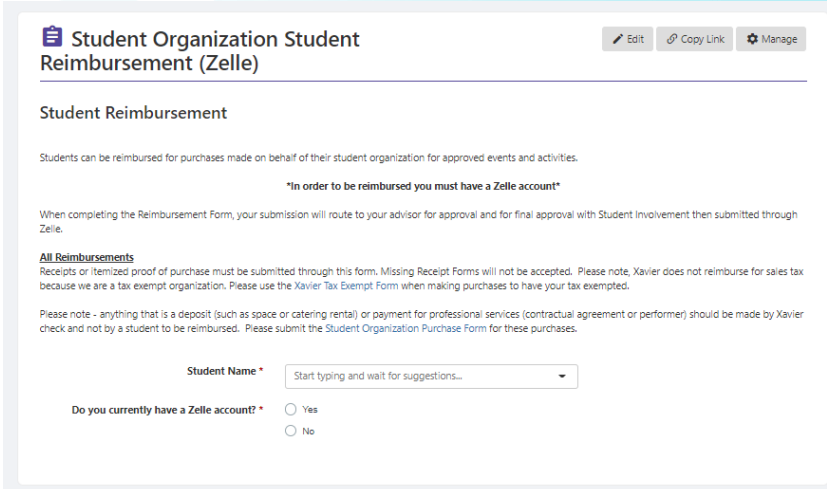


# Pre-Spend Authorization Form

- Individuals who wish to spend **more than \$300** of their own monies and be reimbursed need to submit a Pre-Spend Authorization and have approval from their advisor and Student Involvement prior to the purchase.
- The form requires you to **explain, in detail**, the purchase.
- Some purchases may be able to be made through **other means** (such as university p-card).
- The purpose of this form is to ensure that a student does not make a large purchase that is **not able to be reimbursed** and then still expects to be reimbursed for it anyway.
- Advisors are the first approver so please **contact your advisor** once submitted to ensure timely review and approval of your form.

# Student Reimbursements (Zelle)

- Students can be **reimbursed by Zelle** for purchases made up to \$300.
- Over \$300 can be reimbursed to students via **Zelle**, but a Pre-Spend Authorization must be approved in advance of the purchase being made.
- You must **upload itemized copies** of the receipts in order to be reimbursed. Missing receipts will not be reimbursed.
- The university is **tax-exempted**. We do not reimburse for Sales Tax. Please have a copy of our Tax Exemption Form when making purchases.
- Advisors are reimbursed using the Advisor Reimbursement Form.



The screenshot shows a web form titled "Student Organization Student Reimbursement (Zelle)". At the top right, there are three icons: a pencil for "Edit", a link for "Copy Link", and a gear for "Manage". The main heading is "Student Reimbursement". Below this, there is a paragraph stating: "Students can be reimbursed for purchases made on behalf of their student organization for approved events and activities." This is followed by a bolded instruction: "\*In order to be reimbursed you must have a Zelle account\*". Another paragraph explains the submission process: "When completing the Reimbursement Form, your submission will route to your advisor for approval and for final approval with Student Involvement then submitted through Zelle." There are two sections of fine print: "All Reimbursements" which states that receipts or itemized proof of purchase must be submitted and that missing receipts will not be accepted; and a "Please note" section which states that deposits or payments for professional services should be made by the organization, not by a student. The form includes a "Student Name" dropdown menu with the placeholder text "Start typing and wait for suggestions...". At the bottom, there is a question "Do you currently have a Zelle account?" with two radio button options: "Yes" and "No".

# Purchase Form

- Used to order items from **Amazon** or **office supplies** from Brown Enterprise Solutions.
- Used to **pay vendors**
  - Must have quote or a contract
  - Do not sign any contracts
  - Ask for a W-9 form (IRS) if we've never paid the vendor before (or if you're unsure)
- **Not used to hire students**
  - Students that are being hired (DJ, graphic design, etc.) have to be setup through student employment payroll. Contact Dustin to do this.

The screenshot shows a web form titled "Student Organization Purchase Form". At the top right, there are three buttons: "Edit", "Copy Link", and "Manage". Below the title is a section for "General Information".

**General Information**

Prior to completing this form, you will need either a quote or unsigned contract from a vendor for your purchase OR you will need a detailed shopping list for your purchase (if Amazon or Office Depot). For any purchase being made as a check to a vendor, you will likely need to upload a copy of their W-9 to this form.

The university has an account with Amazon and Office Depot that allows you to bill these purchases directly to your organization. Please allow 3-5 business days for purchases to arrive.

**Student Organization \***

**Is this purchase request for a Club Sport or another student organization? \***

Club Sport

All Other Student Organizations

**Is this purchase request for either Amazon or office supplies? \***

Amazon

Office supplies

Neither

**Is this purchase request related to apparel, brand use or screenprint merchandise? \***

Yes

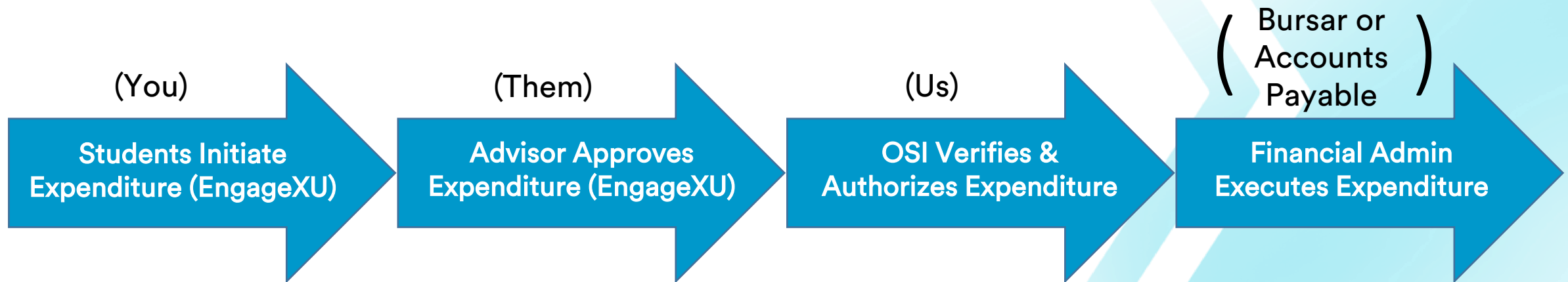
No

**Purpose for purchase \***

Please be detailed about the event/activity involving the purchase.

# Workflow Approvals

The Office of Student Involvement staff serve as the Budget Administrators for all 81xxxx funds. The general financial approval workflow looks like this:



Payment Advance  
Reimbursement (Zelle)  
Pre-Spend Authorization  
Purchase

# Donating Funds & Scholarships

- Student Activity Fee dollars can not be donated, which includes disbursing these dollars to others as a scholarship.
- Groups interested in donating funds to a charitable organization need to fundraise those dollars and deposit fundraised dollars into your student organization fund.
- Treasurers (or fundraising chairs) are responsible for tracking these dollars separately and noting what amount in your group's balance is eligible to donate.
- Scholarships also must be fundraised in order to be given to any recipient.
  - March Gladness is a great time each spring to consider a focused campaign on this fundraising!



# Contract Signature Authority

- Students do not sign contracts on behalf of the university.
- Advisors may sign contracts for limited services such as space rentals, catering. Professional services such as equipment rental need to have a Certificate of Insurance on file with Risk Management prior to signing.
- Performers and speakers entering into contracts should be using either a Performance Agreement Form or Independent Contractor Form with the university. These forms need to be signed by Student Involvement (under \$5k), Student Affairs (\$5-10k) and possibly the Provost (\$10k+).
- Contact Student Involvement well in advance if you need to contract a performer or speaker.
- When in doubt, ask first. And please give us plenty of time to assist you. Contract review can move slowly.

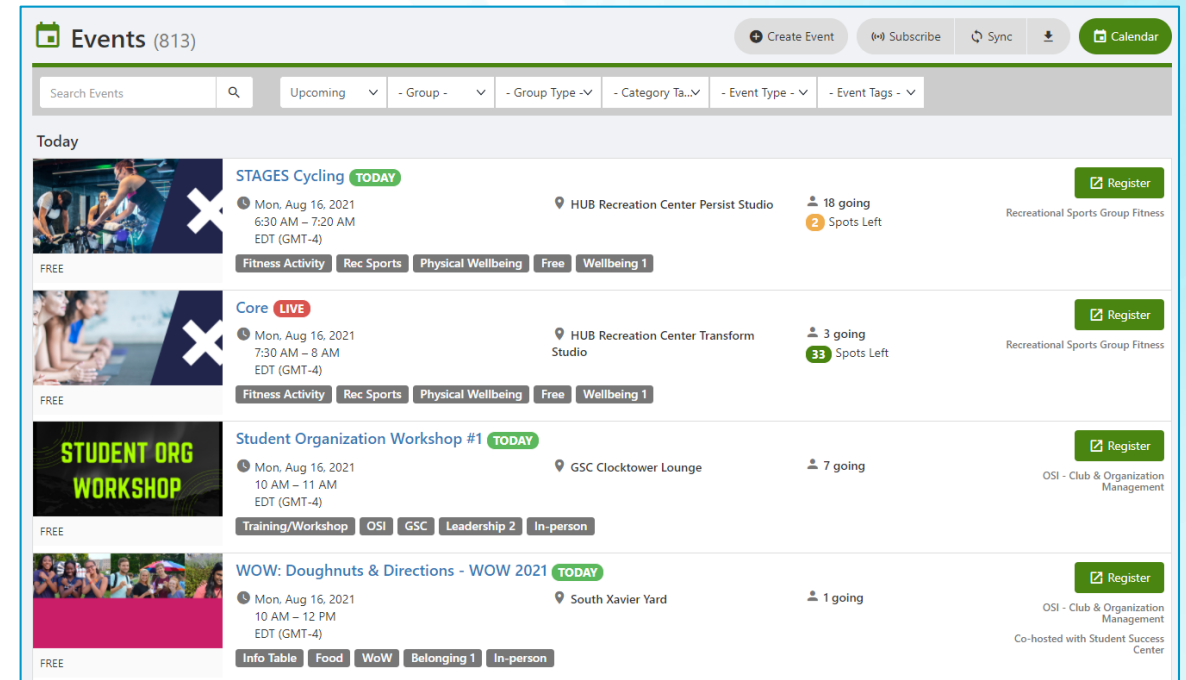
# Events & Activities

- Submitting in EngageXU
- Tracking Attendance
- Space Reservations
- Food Trucks
- Fundraising
- Campus Public Speakers
- Political Activities
- Student Alcohol Events
- Motion Picture Copyright
- Brand-Use & Apparel
- Travel
- Hazing Prevention
- End of Programming



# Submitting Events in EngageXU

- Student organizations must submit all events and activities as **Events** in EngageXU. This includes meetings.
- When submitting the event, you will automatically complete a supplemental form for your event to be approved.
- When submitting an event, please have as much **accurate detail** as possible, including confirmed spaces (if applicable) and promo/graphics.
- If you go back later and change details, the form will route for approval a second time.




The screenshot displays the EngageXU Events interface. At the top, there's a header with 'Events (813)' and navigation options like 'Create Event', 'Subscribe', 'Sync', and 'Calendar'. Below the header is a search bar and several filter dropdowns: 'Upcoming', '- Group -', '- Group Type -', '- Category Ta...', '- Event Type -', and '- Event Tags -'. The main content area is titled 'Today' and lists four events, each with a thumbnail image, title, date, time, location, and registration status. Each event also has a 'Register' button and a list of tags.

Event Title	Date & Time	Location	Registration Status	Tags
STAGES Cycling	Mon, Aug 16, 2021 6:30 AM - 7:20 AM EDT (GMT-4)	HUB Recreation Center Persist Studio	18 going 2 Spots Left	Fitness Activity, Rec Sports, Physical Wellbeing, Free, Wellbeing 1
Core	Mon, Aug 16, 2021 7:30 AM - 8 AM EDT (GMT-4)	HUB Recreation Center Transform Studio	3 going 33 Spots Left	Fitness Activity, Rec Sports, Physical Wellbeing, Free, Wellbeing 1
STUDENT ORG WORKSHOP	Mon, Aug 16, 2021 10 AM - 11 AM EDT (GMT-4)	GSC Clocktower Lounge	7 going	Training/Workshop, OSI, GSC, Leadership 2, In-person
WOW: Doughnuts & Directions - WOW 2021	Mon, Aug 16, 2021 10 AM - 12 PM EDT (GMT-4)	South Xavier Yard	1 going	Info Table, Food, WoW, Belonging 1, In-person



# Tracking Attendance in EngageXU

- Officers for your organization have access to track attendance using EngageXU.
- You can track attendance several different ways:
  - Lookup and check-in attendees using your phone or a laptop
  - Scan their QR codes using your phone or check-out a card swipe device from Student Involvement.
  - Have the event QR code printed and allow attendees to scan and check themselves in BUT you should verify that they were successful by showing you their check-in on their phone!
- Refer to the How-To Guide online


**ENGAGE  XU**  
*How-To Series*

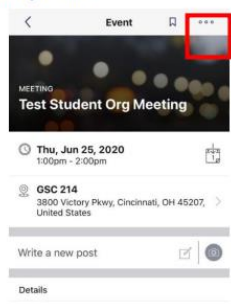

### CHECKING PEOPLE INTO EVENTS

There are many ways to check into an event through EngageXU, but we encourage groups to use the QR code feature to scan guests in safely and efficiently.

**Scanning Individual Attendees At Event**

If your event has a small attendance, then you can individually scan attendees using the QR scanner in the mobile app. Both the scanner and attendee must have smart phones or tablets with the mobile app and an EngageXU account for this option to work.

1. Download the **CampusGroups** app  and search for **EngageXU**. After logging in, click **Events** on the bottom toolbar. Select the event you want to track attendance for. On the event's detail screen, click the three dots on the upper right corner.



# Space Reservations

- The EngageXU Event Form acts as a space reservation request for the following spaces:
  - Outdoor (Xavier Yard & Academic Mall)
  - Justice Atrium (formerly Fenwick)
- Classrooms are reserved by the Registrar's Office ([xureg@xavier.edu](mailto:xureg@xavier.edu))
- Gallagher reservations can be done online through Mazevo - [xavier.edu/gsc](http://xavier.edu/gsc)
- HUB reservations are through Rec Sports staff – refer to our contact guide
- Cintas reservations are through Cintas Center staff – refer to our contact guide



# Food Trucks

- Food Trucks are limited on campus due to the university's contract with Chartwells.
- Food Truck request process is being finalized now but we anticipate one approved food truck per month (~5 in the fall and ~5 in the spring).
- External catering (or drop and go service) from a food vendor is permitted in all spaces outside of Cintas Center and Hoff Dining Commons.
- Food trucks are not permitted to sell food on campus. Student groups must pre-arrange for payment and quantity to be provided (similar to how catering works)
- If your organization anticipates wanting to bring a food truck, please let us know.



# Fundraising

- Student Organizations are required to register all fundraising activities
  - Sales to members (t-shirts or club apparel)
  - 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.
- Dues can be easily collected through EngageXU. Contact Dustin if you're interested in setting up online dues payments.

# Campus Public Speakers

- When hosting a public speaker or event, student organizations must have approval before advertising and hosting a speaker or lecturer. This request should be submitted as an event in EngageXU and requires approval from Student Involvement, Student Affairs and the Provost.
- 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.



# Political Activities

- 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 (such as voter registration).
- 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.



# Student Alcohol Events

- Events where alcohol is to be served require permission, per the Alcohol & Other Drugs Policy.
- These events should be submitted in EngageXU. Please indicate **Alcohol Event** when submitting your event for approval.
- Primary considerations for 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

# Motion Picture Copyright

- 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.
- Clubs cannot bypass the licensing by partnering with a class or by having a professor as a faculty advisor for their group.
- Permitted streaming services:
  - Netflix Original Documentaries
  - Kanopy (university library)
  - SpectrumU



The unauthorized reproduction or distribution of this copyrighted work is illegal. Criminal copyright infringement, including infringement without monetary gain, is investigated by the FBI and is punishable by up to 5 years in federal prison and a fine of \$250,000.



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# Brand-Use, Promotional Material & Apparel

- All apparel or promotional items should be submitted for approval to Marketing & Communications via the Promotional Materials & Apparel Approval Form in EngageXU.
- Student organizations are limited to using either the primary university brand or secondary.
- D'Artagnan, Blue Blob or sword are limited to athletic-use only.
- The university also limits the vendors that can be used to only those that are licensed with the university. For a complete list of vendors, please visit [www.xavier.edu/apparel](http://www.xavier.edu/apparel). This page also has links and a step-by-step guide for submitting and ordering promotional material and apparel.
- New vendors are not being licensed at this time.



# Student Domestic Travel

- A trip or travel is defined as more than 35 miles from campus or involving an overnight stay (regardless of distance from Xavier).
- Students should submit a Student Domestic Travel Itinerary Form in EngageXU **at least 3 weeks prior to travel!**
- When submitting your itinerary form, you will be required to submit a list of participants. It may be a partial list when first submitting but the final, updated list needs to be filed at least 48 hours before you travel.
- You will also need to submit detailed travel information about hotels, flights or transportation, departure time, arrival time, return time, etc.
- Purchases associated with the trip will only be approved for payment or reimbursement if the travel itinerary form has been submitted and approved.
- Trip organizers should inform students that if they are not feeling well and presenting symptoms of COVID-19, they should test and not travel. If a student develops symptoms while traveling, they should test and isolate away from the group.

# Off-Campus Activities

- Off-Campus Activities are defined as any event taking place off-campus within a 35 mile radius and does not include overnight stay.
- Examples could include a group going to ski at Perfect North Slopes, participating in a service project downtown, hosting a day-long retreat at a space in Cincinnati, or attending a Reds game.
- These activities should be submitted through EngageXU as events for review and approval.
  - To be clear, you do not need to complete an additional form unless it is a higher risk activity and then you should use waivers.



# Anti-Hazing Policy

- Xavier has a new Anti-Hazing Policy, effective Summer 2022
- Ohio passed Collin's Law which requires all students and advisors to go through a Hazing Awareness and Prevention Training. You received a link last Tuesday (8/16) from [campusmessage@xavier.edu](mailto:campusmessage@xavier.edu).
- Training
  - ALL students and employees must complete a Hazing Awareness and Prevention Training
  - Per the law, students must complete training in order to participate in any sort of group or organization affiliated with Xavier
- Reporting
  - Mandated reporting – if you have knowledge or witness hazing you must report it to both Xavier and law enforcement (XUPD)

# Hazing Prevention

- Hazing is often thought of as extreme actions required of members pledging to join an activity or group where they are subjected to humiliation or rigorous physical activities as an barrier to joining.
- Hazing is that but also much more. Here are a few examples:
  - New members performing unnecessary duties not assigned to others
  - Required “greeting” of members in a specific manner when you see them
  - Required carrying of certain items
  - Wearing embarrassing or uncomfortable clothing
  - Forced consumption
- If you ask yourself, “why do we have to do this,” or if you ask why and someone tells you, “because everyone else did it,” there may be a pattern of hazing. You should report it!

# End of 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. Students cannot receive cash as a prize.

# Baseline

- Meeting Requirements: Clubs will be required to hold at least one general member meeting per month. Based on the academic calendar, the club should meet at least 3 times in the fall (September, October, and November) and 4 times in the spring (January, February, March, and April). The club will be required to document meeting minutes (some details of the meeting business) and submit the agenda/minutes each month via EngageXU for verification.
- Faculty/Staff Engagement: Club officers and/or general members should meet with faculty/staff advisors at least once per month. This should occur at least 7 times throughout the year. The club will be required to document advisor meetings and submit the agenda/minutes each month via EngageXU to Student Involvement for verification of this requirement.

# Baseline

- Membership Recruitment & Retention: Clubs will be required to create a recruitment and retention plan for the fall and spring semester, detailing the steps the group is taking to both recruit new and retain new and existing members
- Programs & Events: Clubs will be required to hold at least 2 events per semester, outside of a regular club meeting.
- Service Engagement: Being integral to who we are as a Jesuit Catholic institution, Clubs will be required to participate in one service activity per year, as a club with a goal of participation from 80%+ of the roster.
- Student Activity Fee Usage: Clubs will now be required to spend 85% or more of the funds allocated from SGA during the fiscal year toward club activities, events and approved travel.



# week of **WELCOME**

August 21 - 30



Week of Welcome (WoW) is a week of free events welcoming first-year & transfer students to campus, as well as welcoming back our returning students.

Download the EngageXU app for more details and a full list of events!



**X** GET THE APP

**X** STUDENT INVOLVEMENT  
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# club day

WEDNESDAY  
August 31st, 2022

2:00 PM - 5:00 PM  
on the Xavier Yard

Over **150** clubs  
discover yours today



**X** STUDENT INVOLVEMENT  
GALLAGHER STUDENT CENTER  
COMMUTER SERVICES

DISCOVER  
**develop**  
LEAD



# Thank you for attending!

Stop by and see us any time in Gallagher 210

