# Org 101 Training
## For Undergraduate RSOs

University of Denver 2022-2023

**CHECK-IN**

ORG 101 TRAINING (VIRTUAL)
WEDNESDAY, AUGUST 17 AT 2:00PM

http://cglink.me/2fC/c1636297722164319

<< Please Check In by scanning the QR Code, which may prompt you to log into CrimsonConnect.

# Welcome!

**We are excited to begin the 2022-2023 year at DU.**

Student Organizations at our University have created some of the most engaging, exciting events for students over the years. Through the many organizations across campus, our goal for this year is to wholly support the financial, structural, and creative needs of Registered Student Organizations (RSOs) at DU.

# RSO, OSE, USG : Acronyms to Know

**RSO:**
Registered Student Organization

An "RSO" is a Student Organization, made up of 10 or more undergraduate student members, with a clear & unique purpose on campus. A student organization is considered "Registered" if they have been approved by the Office of Student Engagement and the Undergraduate Student Government. This approval takes place each Spring for the following academic year.

**OSE:**
Office of Student Engagement

OSE provides ALL University of Denver students a co-curricular experience that empowers them to explore, connect, and grow.

Collectively OSE supports Student Government (USG & GSG), DUPB, RSOs & their advisors, University-wide Hallmark Events, Leadership Development, and Fraternity & Sorority Life.

**USG:**
Undergraduate Student Government

USG serves to foster the growth and welfare of the University of Denver and its students, faculty, staff, alumni and the greater community associated with the University of Denver.

USG supports the needs of RSOs structurally and financially through the Student Orgs and Finance Committees.

# RSO Home Base:

- Request Funds from USG (including DivCom and SusCom funding)

- Submit Payment Forms & Receipts to the Business Office

- Build your own public-facing RSO website

- Register your own org's events and track attendance

- Maintain a roster of active "Members" and regular "Contacts"

- Contact group members & contacts without needing to maintain a separate listserv

- Keep important files year-to-year without needing to pass along USB drives or update sharing permissions in OneDrive/Google Drive/DropBox

- Re-register your organization each year

- Collect feedback after events

- Distribute Surveys/Forms

- Run Internal Elections

- Maintain internal record of financial transactions

# Quick Officer Onboarding:

**Officer Dashboard:**

When you open an RSO page for a group you're an officer of you'll see the officer dashboard.

All of the management features live here and the tiles will automatically re-order based on what feature was most recently used by an officer of your group.

Officer Bootcamp Video>>
https://vimeo.com/592199127/d40d4bf6dd

Quick Officer Onboarding:

**Membership Roster:**

# Quick Officer Onboarding:

**Events:**

Save drafts to finish later

Create Event Templates

Create Tickets & Set Prices

Automatically Request Feedback

Who can see and RSVP

Add a Waiver for Attendees to sign

Co-host with another RSO
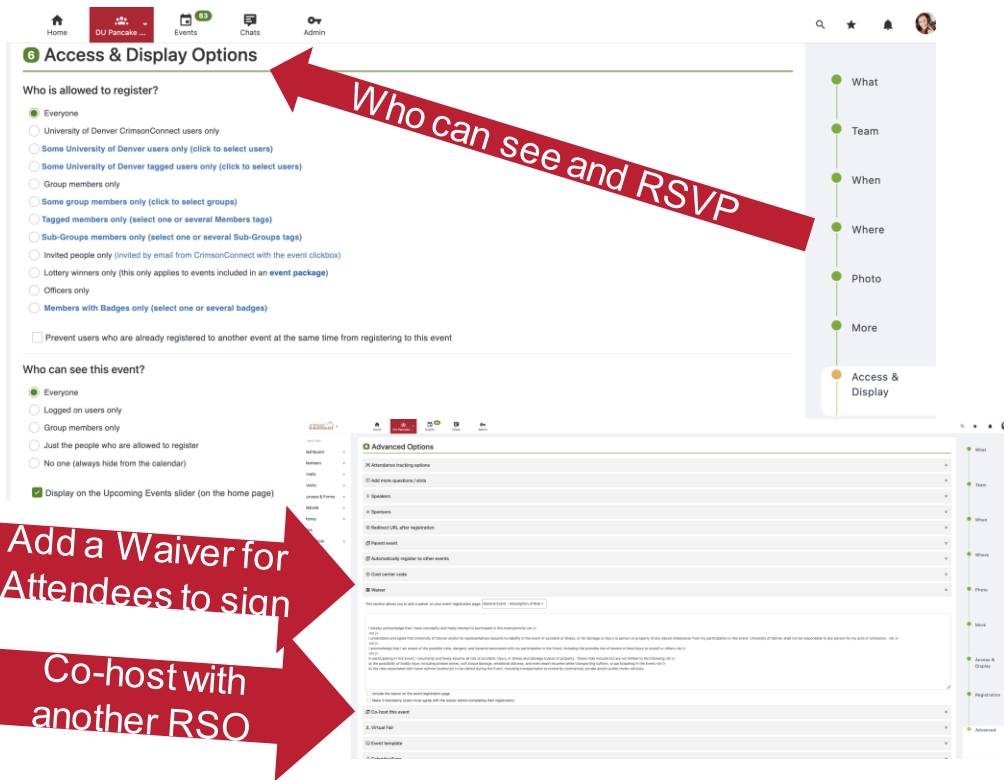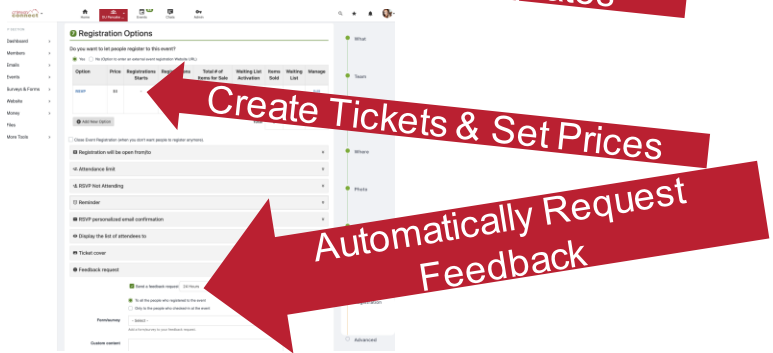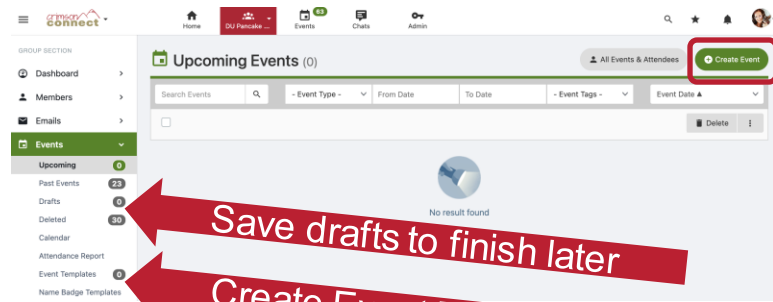
# Quick Officer Onboarding:

## Surveys/Forms:



Create Workflows for Reviews

Variety of Survey/Form Types

Variety of Question Types

Build survey logics
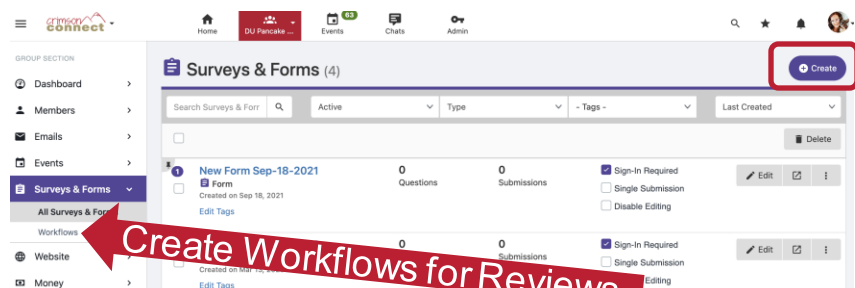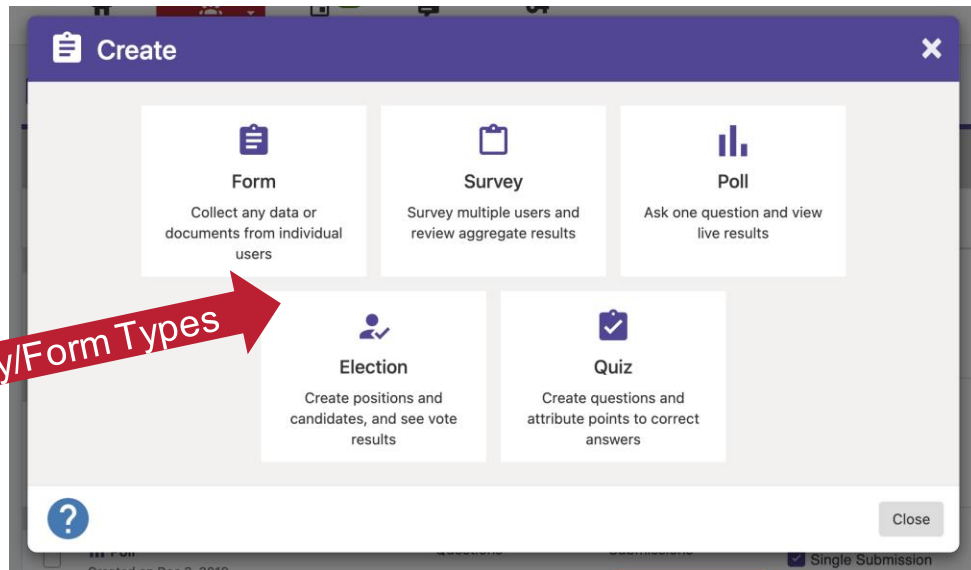
# Quick Officer Onboarding:

**Website:**

A URL based on your group Acronym

Simple Drag & Drop builder that can pull dynamically from your group info

**Money Features:**

Quick Officer Onboarding:

# Other Resources:

**Video Tutorials** have been created to walk you through certain features step-by-step:
crimsonconnect.du.edu/ OSE/helpful-links-documents

-

**Announcements** will be displayed on the homepage when needed

-

**The Pulse and RSO Newsletters** are archived for your viewing at any time

### CrimsonConnect Video Tutorials

Video tutorials to introduce you to settings and features that will help you optimize your use of CrimsonConnect as a user or an officer

*NOTE: Some features reviewed may be available only to system administrators or may not be currently available in DU's version of the system.*

**Overview for New Users**

A quick introduction to the system with an overview of where to find various tools and features. (3min)

**Officer Overview**

A quick introduction to the features that Group Officers have access to including event creation, website building, emailing and more. (4min)

**Managing Your Group's Settings**

A more in depth review of the settings that Officers have the ability to manage for their group page. (3min)

**Group Pages and Feeds**

A quick introduction to the Group Pages and Feeds within the system. (3min)

**Event Planning & Attendance Tracking**

An overview of the +CREATE EVENT feature and how to track attendance at events. (13min)

**Forms, Surveys & Workflows**

An in depth step-by-step overview for using the Forms & Surveys tool in CrimsonConnect. (38min)

**Drag & Drop Website & Email Builders**

An in depth step-by-step overview for using the drag-and-drop editors to build a public-facing website for your group and for building emails/newsletters. (38min)

**In Depth Overview of the System**

An in depth step-by-step overview for the CrimsonConnect platform (CampusGroups) for any user brand new to the system - this video provides quick snippets of many of the other in-depth tutorials listed here. (45min)

Officer Bootcamp Video:
https://vimeo.com/592199127/d40d4bf6dd

RUNNING YOUR RSO

# USG Student Organizations Committee

**Chair: Kenna Stephen** (*kenna.stephen@du.edu*)
*USG Student Organizations Committee 2022-2023*

USG shall oversee registered student organizations devoted to creating meaningful and incredible interactions for students on campus. These organizations are the life of student engagement.

*usgorgs@du.edu*

# Requirements for Student Org Registration

- **Designate a President, Vice President, and Treasurer**

- **Maintain at least 10 active members**

- **Keep constitution active and updated**

- **Designate your organization's staff/faculty advisor**

# Organization Registration Requirements

**Overview & Timeline**

- Applications to create a new student organizations are accepted year-round
- The Office of Student Engagement and the USG Student Organizations Committee will prioritize applications submitted within the first 3 weeks of every quarter

**Registration & Re-Registration on CrimsonConnect**

- Log into CrimsonConnect (crimsonconnect.du.edu) with your first.last@du.edu email address & password
- Use the icons at the top of the home-page to view the full list of RSOs
  - There are options on this page to register a new RSO, or Re-Register your RSO during the annual Re-Registration period in the Spring

# RSO Registration Compliance

**HARM PREVENTION EDUCATION**

- USG passed a resolution requiring undergraduates to participate in a series of harm prevention educational programs
- ALL RSO Officers and 25% of each RSO's membership (based on rosters submitted during registration)must complete a session this year in at least one of the following areas:
  - Mental Health
  - Equity & Inclusion
  - Recovery Allyship
- Each RSO has until Re-Registration in the Spring to fulfill this requirement https://cglink.me/2fC/s72507
- Potential for additional topics to be added throughout the year as new staff are hired

<< Sign up for a training

2022-2023

# Student Organizations

**Registered Student Org Life Cycle**

- Elections & Transition
- Registration/ Re-Registration & Approval
- Org 101 Training Review of New Policies/Guidelines
- Funding Request & Programming
- Ongoing Opportunities for Officer and Advisor Development

RSO FINANCES:
Requesting Money
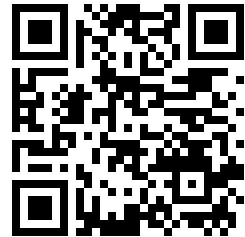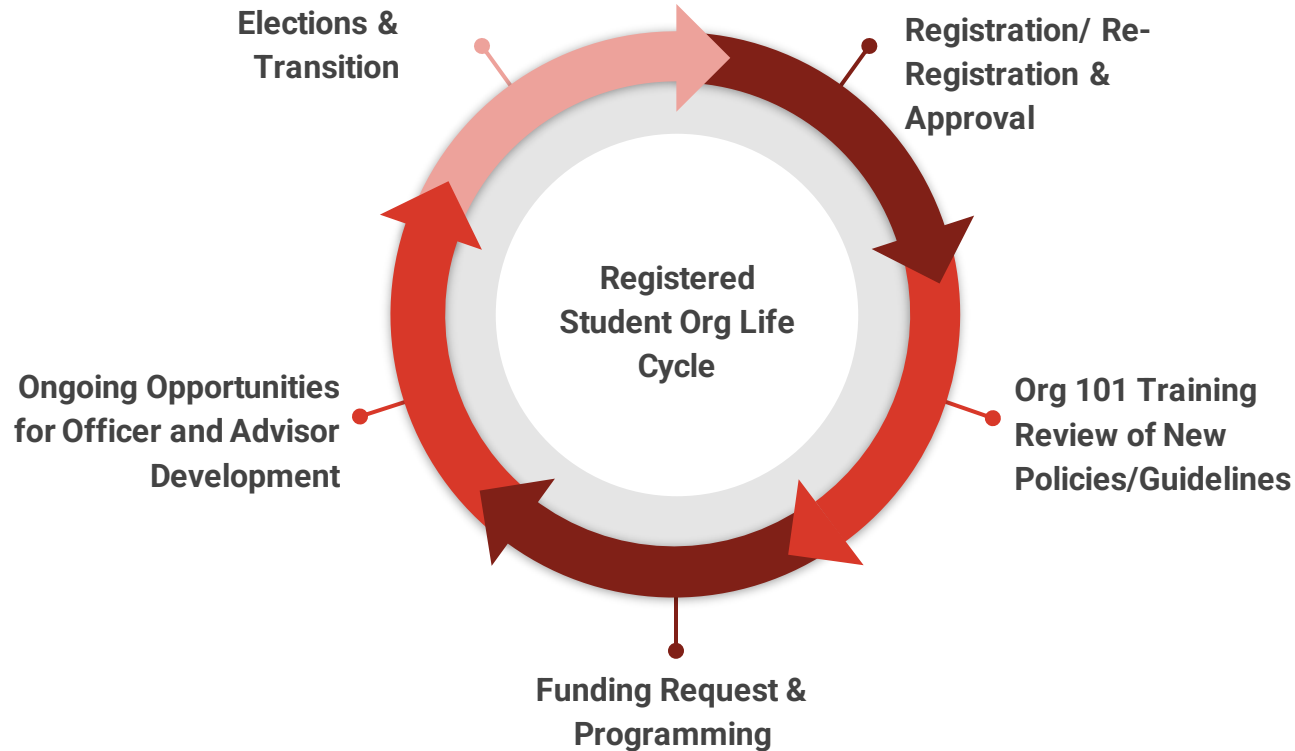
# USG Finance Committee

**Scarlett Remer**
*USG Finance Committee Chair 2022-2023*

USG funding exists to enhance the student experience by providing necessary monetary support and resources to programs, ideas, and development of various student organizations on campus.

*usgfinance@du.edu*

# Funding Sources and Procedures

**Base Allocations**

Registered Student Organizations receive an annual fixed "base allocation" determined by their club membership quartile with the ability to request additional supplemental funds throughout the year:

Membership Quartile 1 (0.00-25.00%)  - **$300**
Membership Quartile 2 (25.01% - 50.00%) - **$500**
Membership Quartile 3 (50.01% - 75.00%) - **$700**
Membership Quartile 4 (75.01% - 100.00%) - **$900**

*Affinity Group allocations are determined and distributed by Diversity Committee based on annual event needs and engagement*

*Unused funds allocated from USG will be swept at the end of the fiscal year and do not roll over*

# Additional Student Funding

**All Registered Student Organizations may apply for additional funding to supplement their base allocation.**

**This application is available through CrimsonConnect and approval will be up to the discretion of the Finance Committee.**

**Requests Less than or Equal to $1,500:**

Must be completed *three weeks* in advance

Application includes full itemized budget

**Requests Over $1,500:**

Must be completed six weeks in advance

Application includes full itemized budget

**Requests Over $5,000:**

In addition to the requirements for requests over $1,500, $5,000+ will require the student organization to present at the USG Senate weekly meeting.

# Funding Application

The 2022-2023 Supplemental Funding Application can be found on CrimsonConnect or directly through this link:

## https://cglink.me/2fC/s71173



The application will ask for specific information about your event, and require a projected event budget spreadsheet upload.

# Funding Application: DEI & Sustainability

Affinity groups represented by Joint Council and any RSO who believes their event/initiative advances Diversity, Equity, & Inclusion on campus may use this same form to request funds, and it will be routed to the USG Diversity Committee for review. Additional questions can be directed to usgdivcom@du.edu

RSOs who believe that their event/initiative supports one of the DU Sustainability Goals, may use this same form to request funds from the USG Diversity Committee for review. These requests must be in at least 2 weeks prior to the event date. Additional questions can be directed to usgsuscom@du.edu

MGC Chapters should also use this same form for additional funding, the request will be routed to the Office of Fraternity & Sorority Life.

# Funding Application: Tips for Success

- **Budget in Detail:** Include all forecasted expenses, revenue sources, prices, and quantities when submitting your itemized budgets.

- **Vision & Impact:** Thoughtfully consider how your intended use of funding will enhance the undergrad experience and educate the broader DU community.

- **Promotion:** Create and outline a strategic marketing plan in order to increase turnout on campus.

- **Presentation:** If presenting to USG (for requests over $5,000), applicants should dress in business casual attire and prepare compelling verbal reasoning as to why USG should fund their proposal.

RSO FINANCES:
Spending Money

# Working with the Business Office

The Student Affairs business office team helps RSOs with the **logistics** of making purchases, paying vendors, handling funds coming into your organization, and transferring funds between groups.

Only those listed as OFFICERS in CrimsonConnect will be able to put in requests with the business office, so if a general member of your organization will be handling this, they'll need to first be listed as an "Authorized Spender" in the officers list, and they'll also need to complete Org 101 Training & pass the associated quiz (earning this year's badge).

You can connect with the business office team at: studentcomptroller@du.edu

# Funded Versus Non Funded

| Funded |
|--------|
| Allocations from USG |
| RSO's will always be:<br>Fund - 90300<br>Org - Unique to your RSO |
| Funds only valid 7.1 - 6.30 |

| Non Funded |
|------------|
| Revenue raised by your RSO (dues, fundraisers, etc.) |
| Fund - Always starts with 9 and ends in S<br>Org - Always 116699 |
| Funds roll over each year. |

Please email studentcomptroller@du.edu  for questions about your fund or account.

# Finance Forms

All of the necessary funding request and finance forms can be found in CrimsonConnect, including:

- Supplemental Funding Request Form
- P-Card Checkout Request
- P-Card Receipt Submission
- Amazon/Staples Order Form
- Group-to-Group Transfer Request
- Deposit Slip

*Personal Reimbursements will not be processed this year.*
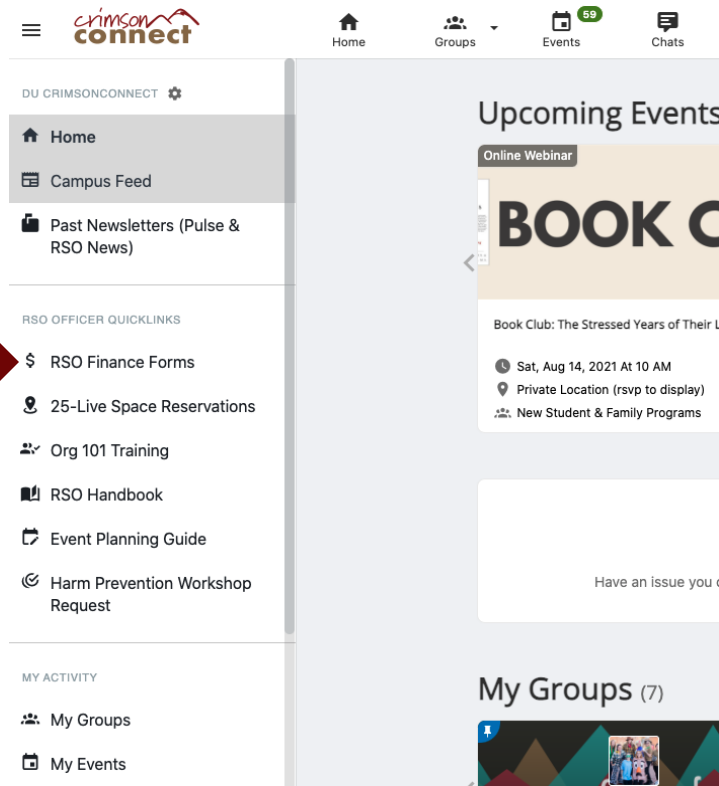
# Purchasing Card Protocols

**Who can check out PCards?**

Officers within your organization who has completed the current year's Org 101 training and received the badge for the current year.

Note that the person who made the request in Crimson Connect *must* be **the same person** checking out, using, and returning the P-card.

**What else do I have to do to check out a PCard?**

Complete Org101 training in CrimsonConnect

Complete PCard Request Form in Crimson Connect

Submit the request form at least 3 business days in advance

# Purchasing Card Protocols

**What is the PCard check out process?**

1) Complete Request form in CrimsonConnect at least 3 business days before P-Card needed

2) Community Commons Welcome Desk will reach out to requestor with a calendar invite for P-Card use once approved

3) Requestor picks up at Community Commons Welcome Desk at assigned time
Can check out for 3-hour periods of time Monday - Sunday from 9 am - 9 pm

4) Return it to Welcome Desk
If checked out at 6 pm or later, return the following business day by 9 am

# Purchasing Card Protocols

**Receipts, Tax Exemption, Etc.**

Upload original **itemized receipts** via the P-Card Receipt Form **as a PDF** on CrimsonConnect within 3 business days after returning the P-Card Please note that failure to submit legible receipts timely will result in loss of P-Card use if you have not discussed the circumstances with the Business Office beforehand

Amazon and Staples purchases are only available through a Amazon/Staples Order Form request in Crimson Connect. Orders are placed every Friday before close of business by the Community Commons Welcome Desk

**P-Card purchases must be tax-exempt.** There are a few exceptions to this such as airlines and purchases outside of CO.

P-Cards **cannot** be used for gifts, gift cards, prizes, or parking citations.



Vendor name

Itemized

Tax Exempt

Total Paid

Correct

Incorrect

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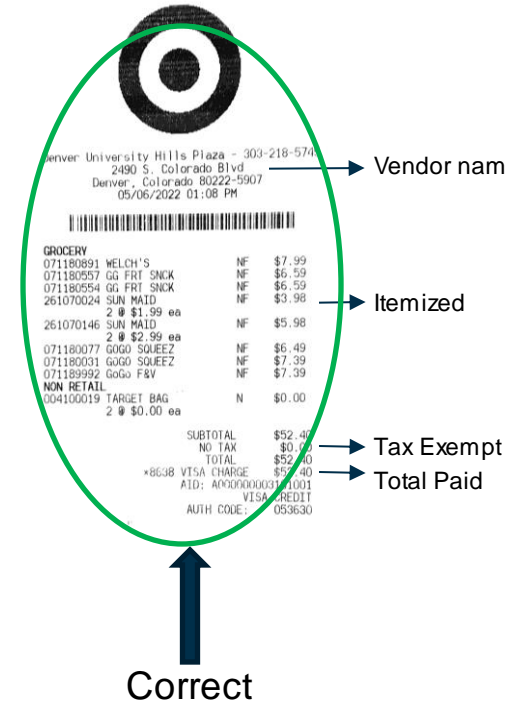
# Purchasing Card Protocols

**Miscellaneous Things to Know**

When food is purchased, submit a list with the full names of participants for groups of 10 or fewer.  For groups over 10, we only need the number of attendees submitted.

*Itemized receipts* are also required with meal purchases.

Max tip amount is 20% . . .  when tipping is appropriate.

For hotel charges, submit the folio with itemized charges you receive at checkout

**Examples of Things You CANNOT Buy . . . ask us if you are unsure:**

Alcohol
Illegal Substances
Gift Cards
Gift Certificates
Computers
Subscription Services/Recurring Charges
Parking Citations
Parking
Donations
Ride Share (Uber, Lyft, Lime Scooters, etc)

**NEVER** add DU P-Card information to a personal account that pulls the card information automatically *(DoorDash, ApplePay, GooglePay, Ride Shares, etc.)*

# Purchasing Card Protocols

**All necessary forms are located in Crimson Connect**

**Failure to comply with these rules will result in both you and the organization being prohibited from using the P-Card for a minimum of 1 quarter and a maximum of 1 academic year.**

# Invoices

Paying invoices can vary based on the vendor. Establish how they need to be paid during initial conversations. Credit card, Check, or Direct Deposit are the **only** ways DU can pay a vendor. Vendors should be registered with DU to receive checks by filling out the new vendor registration form.

Even vendors you've worked with in previous years need to re-register with the University each year.

Invoices should be sent to studentcomptroller@du.edu for processing if a check is to be issued. If paying by credit card, please use a P-Card.

DU Vendor Registration >>
https://www.du.edu/sharedservices/vendors/new-vendor-registration

# Contracts

**Contracts must be submitted as part of the Event Registration form for ALL services coming to campus**

*Examples: Food Trucks, DJs, Entertainers, Performers, etc.*

**Students are <mark>NEVER</mark> permitted to sign a contract on behalf of their student organization**

**If a contract is required, even if it is off-campus, it must be submitted as part of the Event Registration form.**

Vendor Contracts must be submitted at least 6 weeks prior to the event

# Vendor Payment Requirements

**Payments > $5,000 - $25,000**

    -Provide 2 quotes from different vendors

**Payments > $25,000**

    -Contact Business Office 8 weeks prior to event

**Contracts**

    -If there is a contract submitted through CrimsonConnect, mention the contract when submitting the receipt

**Submit all required documentation to [studentcomptroller@du.edu](mailto:studentcomptroller@du.edu) or through the event registration form for contracts.**

# Group-to-Group Transfer Requests

The purpose of the Group-to-Group Transfer Request Form is for Student Organizations to support other Organizations' events and activities through a funds transfer (form available on CrimsonConnect).

Once received a Business Officer will review the form and either approve or deny the transfer. Approval is based on the completeness and accuracy of the form, as well as the availability of funds.

The organization that is providing the funds must be the one that submits the form as approval of the transfer. For example: if Pancake Club is sponsoring Scuba Club then the treasurer of Pancake Club would be the one to submit the form on the behalf of each organization.

Please email studentcomptroller@du.edu for any questions. The form is located in Crimson Connect.

# Deposits/Fundraising

The form needed to fill out for a deposit is located in Crimson Connect. You will need to know your fund and org to ensure it goes into the right RSO. Upon approval of the form by a business officer, you can schedule a time to bring in any checks/cash that need to be deposited.

Please email studentcomptroller@du.edu to make sure a business officer is in to receive the deposit. A DU staff member must sign the deposit log in person to confirm that what is being received is what is being deposited.

Please make every effort to get the money that needs to be deposited to a business officer within two business days of receiving it

When fundraising the only acceptable forms of payment that can be accepted are cash, checks, or credit cards which can ONLY be accepted with use of the Clover device or through CrimsonConnect.

**Venmo, Pay Pal, CashApp, Apple Pay, etc are strictly prohibited**.

*Note: Sales Tax will be taken out of total revenue for any goods sold*

Please email studentcomptroller@du.edu for any questions.

org 101
training

RSO EVENT PLANNING
GUIDELINES & POLICIES

# Event Registration Timeline

**4-6 Weeks Ahead** of Events that meet **<u>any</u>** of the following criteria...

- Estimated in-person attendance of 100+
- Guest Speaker or Performer(s)
- Off-Campus Event
- Charging for Admission
- Any event requiring Contracts for things like paid performers, caterers, etc (REMINDER: Contracts & COIs must be submitted via event registration on CrimsonConnect 6-8 weeks prior to the event – students can NEVER sign contracts)
- Public Film Screening, requiring special licensing to screen
- Outdoor Event, requiring special permits or special event setup
- Recreational Activities, such as 5K races, contact sports, etc.

**2-3 Weeks Ahead** of In-Person Events that meet any of the following criteria...

- Estimated Attendance under 100
- Events requiring additional facilities or A/V requests to be brought to the space (tables, chairs, trash/recycling, microphones, speakers etc.)

**5 Days Ahead** of…

- Recurring Meetings/Virtual Events
- Tabling Requests

# Event Registration & Approvals

## Start with Your Space

Most on-campus spaces can be reserved through the 25-Live system.
*A screen-shot of your space reference number from 25-Live or a full confirmation of a booked space for other spaces/off-campus locations will be required as part of event registration.*



## Register Your Event on CrimsonConnect

Use the "+CREATE EVENT" button to register your event in CrimsonConnect. This will activate the approvals workflow.
*ONLY those listed as an OFFICER on your CrimsonConnect Group Page will have the option to create an event.*
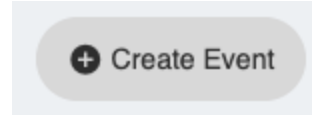
If your RSO has requested USG Funds for an event, those funds will not be released to your RSO until an event registration has been submitted for the event.

## Final Approval/Denial

The Office of Student Engagement will either give final approval or request modifications to your event registration via the CrimsonConnect CHAT feature.
*Some events may require additional review by the DU Event Advisory Group, who may request that your RSO prepare a short presentation.*
Once approved, your event will be updated and posted to the CrimsonConnect Event Slider (and if requested in the Pulse newsletter).

# Event Registration

- Any non-compliance with the event registration or the COVID event protocols will be referred to The Office of Student Rights and Responsibility
    a. Cases will be review and processed for either individual student and/or student organizational level conduct, depending on the severity of the violation.
- For any questions contact SRR at srr@du.edu
- Possible outcomes for recurring non-compliance:
    a. Freezing funds for a period of time
    b. Freezing event approvals for your group for a period of time
    c. Required percentage of members to complete the COVID Event Planner Certification (forthcoming)

# Event Planning Guide

## WHO

- Who is attending your event/primary audience?
- How and when will you market this event to your audience?
- Will you be contracting with any performers or vendors? When contracts be confirmed?
- Will outside attendees/vendors need anything during the time they're on campus?
- Who from your group is volunteering to set up/clean up/host?
- How will this event be inclusive and accessible?
- Who can you collaborate with for this event?

## WHAT

- Will you be handing anything out?(give-aways, printed materials, etc)?
- When will those be designed/ordered/printed/received?
- What materials need to be purchased? When will they purchased?
- Will you be providing food/beverage?
- Who is your caterer?
- When will menu be finalized?

## WHEN/ WHERE

- Where are you hosting your event? Will it be virtual/in-person/hybrid?
- Will attendees need special access (door, virtual link, etc)?
- Will you need special items/set up (tables, chairs, A/V, etc)? When will those orders be placed?
- What time are you hosting your event? How much time is needed for set up/clean up?
- Is your event off-campus/overnight? Who on-campus knows where you will be and who is attending?
- Could this event be hosted as a late night option (hosted on Thursday, Friday, or Saturday; ending after 9pm)?
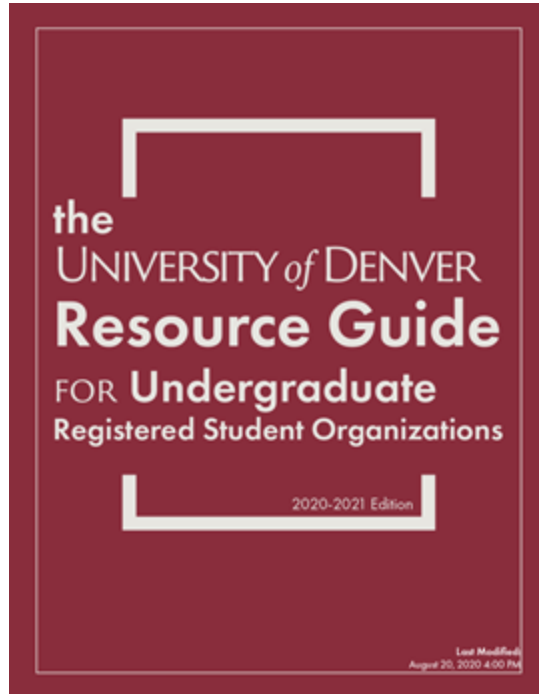
## WHY

- Why is this event important?
- What will attendees leave with after attending your event?
- How will you know if your event was successful?
- How do you plan to follow up with attendees post-event?
- How can others find out about/get involved in future events?

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# Other Important Guidelines & Information

- **All** events should be registered on Crimson Connect through the event registration process
- Ensure that you are checking in all attendees for contact tracing (you can find instructions on how to do this in Event Planning Tools on Crimson Connect)
- Information you will need before filling out the event registration:
  - Location (25-live confirmation or reference number)
  - Anticipated attendance
  - Fund & Org number, estimated cost, co-host/sponsor contact
  - Advisor name & email, Day of Contact name & email & phone number
  - Event details

- Campus departments integrated in this process
  - Campus Safety, Risk Management, Business Office, Cultural Center, Fraternity and Sorority Life

# Additional Resources & Services


the UNIVERSITY of DENVER **Resource Guide** FOR **Undergraduate** Registered Student Organizations — 2020-2021 Edition

**RSO Handbook**

**RSO Officer Newsletters**


crimson connect Officer Newsletter

**Leadership Workshops**


STUDENT LEADERSHIP WORKSHOPS

| Week | Date | Time | Session Topic |
|------|------|------|---------------|
| 6 | 2/10 | 2:00pm | Global Leadership |
| 9 | 3/3 | 2:00pm | Introverted Leadership |

UNIVERSITY of DENVER — STUDENT AFFAIRS & INCLUSIVE EXCELLENCE — Student Engagement

# Thank you

This presentation was brought to you by the USG Finance and Student Organizations Committees, the Business Office, and the Office of Student Engagement.

If you have any additional questions, please feel free to reach out to any of us at:
usgfinance@du.edu
usgorgs@du.edu
studentcomptroller@du.edu
studentengagement@du.edu

We are looking forward to another great year for Student Organizations.