IdealLogic Training Modules

RSO 101

The Basics:
RSO = Recognized Student Organization
SOA = Student Organizations and Activities
SSO – Sponsored Student Organization

Student organizations are living laboratories in which leadership skills are gained and honed while giving students an opportunity to pursue their interests, succeed, and most importantly, to grow. Student organizations expand the learning experience beyond the classroom and provide the opportunity to take responsibility and have accountability for a student organization and its activities.

In recognition that student organizations create a compelling learning environment that prepares students to live and work in a multicultural society and global community, Oregon State University (OSU) subscribes to an advising model that focuses on balancing the needs and learning of students, advisors, and university administrators.

This model seeks shared responsibility between the institution and students by creating a dynamic learning environment that encourages students to take risks and try new things, within guiding boundaries, including state, federal and local laws, university policies and rules, and the missions, values, or purpose, associated with the institution or the student organization. Additionally, this model works to get to "yes" with students but has the ability to say "no" if the request or decision is unlawful or unreasonable.

Values

- **Mission:** In alignment with the institution's mission, we are committed to doing work that serves the needs of our community. We intentionally design our programs to provide students what they need to be successful while dismantling the barriers facing under-served students.
- **Education:** As an institution of higher education, our aim is to facilitate student learning and growth, and to educate around intelligent, fair, and reasonable decision-making and awareness of state, federal, and local laws, along with university policies, rules, and processes. We strive to give and receive constructive feedback to grow our skills and those of our students.
- **Safety:** To foster an educational environment with safety as a priority and to empower our student leaders to be proactive about safety and risk management, event planning measures and inclusive leadership, the institution provides educational opportunities, inviting students to step into the role of collaborative partners and effective decision-makers that benefit the OSU community at large.
- **Community:** Students have a responsibility to understand their role as members of the university and local community, and how their decisions impact those communities. We challenge students to take responsibility for our community experience by leaning into brave conversations, assuming the best of others, and practicing gratitude.
- **Belonging:** We collaborate with students to create nurturing, educational environments where all students can find a sense of home and flourish as part of a diverse and equitable community that demonstrates care towards one another.

What is a RSO?

Recognized Student Organizations (RSOs) are legally separate entities from OSU and function solely under the direction and control of the Student Organization's Members. OSU does not control or accept responsibility for the activities nor endorse the programs of student organizations.

- University Recognition through SOA is how Student Organizations apply to become eligible for benefits and resources, and indicates a formal relationship with OSU; therefore, a high level of accountability from the Student Organization is required.
- RSOs are expected to maintain alignment with OSU's mission while acting in good faith in the business dealings of the organization and are responsible for legal compliance, fiscal accountability and maintaining Student Organization policy and community standards, including the Code of Student Conduct and any other applicable University policies or agreements.

In other words, because you are the ones controlling your own actions, you need to take responsibility for those actions. But we're still here to help you along the way!

Being a RSO means you have access to resources, educational events, and development through the student organization program and may enter into annual or activity sponsorship agreement(s) with OSU departments to gain access to department-controlled resources.

Recognition Eligibility

To be eligible for recognition, the following must be true:

Eligibility Requirement	What does this really mean?
Membership consists of 100% OSU Students and at least 4 currently enrolled OSU students	**How does OSU define a member?** OSU considers a member to be one **who is eligible to vote or hold leadership positions** within the student organization. That individual must be currently enrolled through any OSU or degree partnership program and not employed by OSU in a position that is half-time equivalence (0.5 FTE) or higher. While participation by non-OSU students is permitted (at the discretion of the club via their constitution) those individuals may not be permitted to vote or hold office (this includes OSU faculty/staff).
The organization must comply with OSU's non-discrimination policy	**What's in the non-discrimination policy?** It prohibits restrictive clauses based on age, color, disability, gender identity or expression, genetic information, marital status, national origin, race, religion, sex, sexual orientation, or veteran status. This statement must be stated in your organization's constitution.
Organizations must operate exclusively on a **not-for-profit** basis. • All funds that are raised must be used for fulfilling the purpose and mission of the organization as stated in its constitution. • RSOs are restricted from raising funds, investing, or making profits that are then obtained by or distributed to individual members of the organization for personal financial gain	Club officers or members are **not allowed** to receive any type of financial compensation for their participation in club activities. Your organization allowed to fundraise money to fund your club events and activities. Leaders and members of the RSOs may not be employees of OSU in their student organization capacity, nor receive any form of compensation from OSU for their student organization service or membership.
The organization represents the interests of its members and **control of the organization must be maintained by OSU Students.** • Student members create, manage, amend, and	You are in control of how your organization functions. These operations should be explicitly stated in your constitution, which should be updated each academic year when you submit your annual recognition.

approve the organization’s governing document/s • Student members determine their own leaders (election and removal) through a process defined and outlined in their governing document/s. This includes: • Officer/Leader eligibility and selection criteria • Officer/Leader election and/or appointment • Officer/Leaders roles and responsibilities • Student members direct, control and execute all business and decisions of the organization • Student members determine, coordinate, plan and execute organizational activities, **including campus space and facility reservations** • Student members serve as the primary contact/s for the organization	Your constitution can be updated at any time during the year, as long as you follow the proper procedures outlined within your current constitution. Each bullet point stated in the left column must be included and explained within your constitution.

RSO Designations SSOs & ASOs

There are two sub-designations of RSOs - Sponsored and Affiliated Student Organizations

Sponsored Student Organization (SSO)

An SSO is a RSO that functions under the guidance and support of an OSU Department. Sponsorship is indication that the Department views the organization's efforts as an integral component of the department's goals, and therefore commits itself to provide formal support for the organization and its endeavors. SSOs are required to have a faculty mentor and must complete an annual sponsorship agreement as part of the Annual Recognition Process.

- Required when granting a RSO on-going access to Department resources or an annual budget.
- Department assigns a faculty or staff member to serve as the Faculty Mentor in support of the organization.
- Must be initiated by the RSO and reviewed, approved and/or accepted by the Department Head (or designee), the Faculty Mentor & the RSO.

Affiliated Student Organization (ASO)

An ASO is a RSO whose primary activities are not eligible for Liability Insurance through the RSO General Liability Insurance. These organizations must secure and maintain their own General Liability Insurance and provide a COI to Student Organizations & Activities in order to be approved for recognition.

RSO Benefits

Upon completion of the annual University Recognition process, RSOs become eligible for certain OSU benefits and resources as detailed below.

Baseline Benefit Eligibility:

Listing of current information in the Student Organization Directory
RSO Website
RSO Email Address
Reserve University Space for RSO Activities (1)
General Liability Insurance coverage for on-campus activities (2)
Request and use of RSO Fund Index for RSO business
Request Funding from a Department, including RSO Grants (1,3)

(1) Activities must be reported in advance through the SOA event reporting process.

(2) ASOs are not eligible for this benefit.

(3) RSO must have an active RSO Fund Index

SSO Benefit Eligibility: Through Annual Sponsorship, a RSO may become eligible to access these benefits at the discretion of the sponsoring Department. Access must also be facilitated through the sponsoring Department.

Benefit
a. Departmental Annual Funding
b. University Motor Pool (4)
c. Use University logos and trademarks (4)

(4) An RSO may also become eligible for these benefits with the execution of an Activity Sponsorship Agreement.

Reporting Requirements

What are the required reports for a RSO?

All reports are submitted via your club's dashboard here in ideal logic.

- **Activity and Meeting Reports** It is required for RSOs to report all on-campus activities and meetings in the club database. Off-campus activities are only required if requesting funding from an OSU department, including SOA Grants.
  - Note that these reports should be well in advance of the event or meeting
- **Post-Activity Report** A summary of how an event went, attendance, and budget reconciliation is due 20 days post-event. This will appear as a to-do item in red at the top of your home Dashboard after the event has occurred.
- **Annual Report** is available in spring and is a recap of what occurred throughout that academic year for the organization. Please be sure to fill this out before transition to the new officer team for the following academic year.
- **Annual Recognition** - In spring, the form for the upcoming academic year is released is made available. It is expected that the form be filled out and approved in order for the club to remain active. Recognition lapses annually on July 1 and is not available until you complete the Annual Report.

Why do we report all of our activities?

- Liability insurance coverage for on-campus activity is only available when the activity is reported and reviewed in advance of the activity taking place.
- You are eligible for significant discounts to campus space as a recognized student organization, but you must report your activities ahead of time to access this benefit.
- To get funding from any OSU department or program, you must submit your activity plan first and make your request through the report.
- Submitting your activity report gives us the opportunity to advise you on risk management
- For open activities, submitting reports helps students get involved with your organization

How do we complete reports?

All of these reports take place in the club database (IdealLogic) so that your information stays with your organization from year-to-year. If you have questions about how to fill out a particular report you can contact your Peer Educator on your organization's home page!

If you need help finding the forms, you can review the Club Dashboard Overview training in this set of modules.

Club Dashboard Overview

The tutorial below is an overview of what you can find and access from your Club Dashboard. This site is also referred to as IdealLogic, which is the company that hosts our content. We recommend that you watch the video and explore the Dashboard in order to best utilize the resources available to you through the Club Dashboard. There is a link to transcripts of this video in the Introduction tab.

When you first log into the club database, you will be able to see this dashboard and have access to your members. This includes where you can update who is and is not a member of your organization, who was an officer or an advisor to your organization. It'll also allow you to change who your primary contacts are for your organization.

The next section that we have is meetings. Meetings area is where you can plan and post meetings for your organization. That will be then visible to your members when they log into ideologic where they can subscribe to be able to see upcoming events there are for your organization. After meeting, you can also come in and load meeting minutes to keep historical records of what's happened within the organization over time.

You also will be able to utilize our finance and accounting area. The main thing to note here is that the items listed or it's not necessarily for just this one academic year, can encompass all of the financial transactions that have been made with the club over the past few years or however long the club has been recognized. If you need to access the active record of how much money is in your club RSO fund. Then I would consult the rest of this training to learn more about how to do that.

The last area here on the left is the organization setup. This is where you can update your Constitution, change links for your social media changer forwarding address or your email, and update your logo. Amongst a few other details.

Here on the right side of the screen, we have some quick access links. First, we have the report group service hours. So, if your group has participated in some service hours, you can report them near the website request form.

This is if you would like to start a website for your org or if you need to update who has access to edit your current website.

There is the authorize signer update request. This is actually only available to your primary contact and primary financial officer, but it will be located here if you have that access.

The equipment supplies and department payment form. This is if you're requesting funding that's not related to an event.

And then the activity plan and report. And this is where you can report to your activities and make requests for funding related to activities. One thing I do want to note about the activity plan report is that fewer sponsored student organization, you should be reporting all of your activities, whether they are happening on or off campus here. If you do not report your activities before they occur, then the officer team of the club can be personally liable for what happens during the activity. If you are a voluntary student organization, you are only required to post your activities that are happening on campus. But you are welcome to utilize this system to report all of your activities if you wish.

Last, we have the new meeting. This is just a quick link where you can access to create new meetings.

The lower section here on the right, we do have an area where you can review your annual recognitions. And then, and if you are a sponsor of student organizations, you would be able to review your sponsorship agreement.

There's the email function which allows you to email all the members of your club or sections of the club depending on how they're categorized.

You can print various reports that are related to the club.

There's the reporting area which allows you to see graphs and spreadsheets.

And our annual report where the previous officer team would have filled in information about what occurred in the last year.

The calendar function is next. And that is a spot where you can click to see what events or meetings are coming up for the club. You can also subscribe to the calendar here to be able to link the calendar to your personal or own a Gmail account.

Last is website integration. That is a way for you to get sort of a little summary link about your organization that could be embedded onto website, whether that be your Club website or a department website that supports your club. This is where you would go to get the information of that embed.

The last area that I want to highlight is these tabs here at the top. As an officer, you always come to the dashboard. But if you'd like to see what the member home page looks like, you can click here to see what the public list of officers looks like. You can click here. And similarly with the advisor list. And last, there is the calendar function that shows what upcoming events and meetings there are for the organization.

And that's the general overview of what you can find here in the club dashboard. Again, if you have any questions about how to best utilize the dashboard or ways to navigate the system, please reach out and we can have a consultation meeting about that.

Risk Management

This next section is about Risk Management.

Identifying and Analyzing Risks

When thinking about identifying potential risks in your organization, it can be helpful in understanding the different categories of risk. Below are some common categories of risks that you may encounter as a club officer or advisor. When planning activities, it helps to analyze your plans from each of these lenses:

Category	Risks	Potential Outcomes
Physical	unlicensed caterers, home-cooked food, building issues, slippery surfaces, climbing, jumping, dancing, travel	food poisoning, bruises, slivers, twisted ankles, broken bones, death
Emotional	controversial or sensitive topics, graphic imagery	discomfort, distress, post-traumatic stress response, riots
Facilities	large crowds, candles, non-OSU equipment, heavy equipment, multiple large events at the same time	property damage, violation of fire code, noise disruptions, or complaints
Environmental	the weather, handouts or giveaways, food	rained out event, low attendance, pollution, lack of sustainability
Financial	low/high ticket sales, pre-paying for goods or services, lack of communication about budget	going over budget, not getting what you paid for
Reputational	how members and guests experience your organization and activities, the accuracy of promotional materials	fewer people joining your organization or attending your activities, negative press, or negative comments on social media
Legal	copyright material, alcohol, minors (under 18), accessibility	being fined, being sued, legal charges against officers, club recognition getting revoked

Once you understand what types of risks could be involved in your events, it is important to think about how you are managing those risks moving forward. The next section will explain four tactics to manage the existing risks.

Managing Risks

There are four ways you can manage risks: Avoid, Transfer, Mitigate, and Accept.

Avoid	Mitigate
Can you eliminate an activity that is considered too risky altogether? **What does that mean?** • Eliminate activities that involved risk	*What steps can be taken to reduce the likelihood of losses occurring or lessen the impact of losses should they occur?* **What does that mean?**

• Avoid creating activities that involved risk • This is a relatively extreme approach. Often, there are ways to mitigate the risks	• Manage liability by structuring activities and programs in ways that reduce or limit the organizational risk
Transfer	**Accept**
Can we transfer the risk or financial consequences of a loss to another stakeholder? **What does that mean?** • Insurance policies • Releases and waivers	*Accept the risk as it is. Understand the risks that exist and create a contingency plan for the day of.* **What does that mean?** • Determine who will be in charge if an incident occurs • Know what stakeholders need to be contacted.

Financial Management

This next section is on Financial Management. Topics include:

- What is a RSO Fund?
- SOA Grant Funding
- CORE Reports
- How to make a deposit
- Internal Payments
- External Payments
- Purchasing Card

Important update!

All requests need to be made through the forms integrated into the club database (IdealLogic).

RSO Fund

What is a RSO Fund?

RSO Funds are established for transacting the business of a RSO and must be managed by the Officers of the RSO. The funds contained in the RSO fund are property of OSU and records of RSO funds are maintained in the University financial information system (CORE) and RSO balances roll over from year to year. All RSO finances must be managed through a RSO fund.

A RSO fund is required to:

- receive any financial support from Oregon State University
- transact on-campus business of the organization and
- access benefits of recognition such as reserving campus spaces at free or discounted rates

How do I know if my club/organization has a RSO Fund?

When looking at the home Dashboard, click on Organization Setup. In the first section, General Information, there will be a title that says "RSO Fund Index" and the index listed. If you do not see that noted, then your club/org does not have a RSO Fund.

Examples of Expenditures from RSO Fund

- paying a speaker honorarium
- having a fundraiser
- renting a room on campus
- reimbursing members for out-of-pocket expenses
- purchasing food for a club meeting or event
- event supplies like decorations or props
- fliers printed at campus printing and mailing

For more details on these processes please refer to RSO Funds Guide and Financial Management Resources.

Internal Payment to a Person

With your RSO Fund index, you are able to issue payment to a club member for expenses paid out of pocket or to an OSU faculty/staff member as needed. Below is a tutorial for how to use the form to pay an internal to OSU person. Link to Video Transcripts - https://beav.es/5Y8.

A disclaimer before we start: To access this form you will need to have an RSO index. If you do not have an index, please fill out the RSO Fund Index Request form on your IdealLogic dashboard.

In addition, for this specific tutorial you will need the full name of the student or faculty/staff, OSU email address and mailing address to be able to fill out the form. Let's get started.

1. Log into "**https://apps.ideal-logic.com/osusee**" and click on "OSU login" using your ONID login.
2. On your club dashboard, in the light green box to the right, click on the "Payment Request form."
3. There will be two selections that show up. One is the RSO Payment Authorization and the other is RSO Credit Card Request. You will select the RSO Payment Authorization because you are reimbursing an individual for expenses incurred out of pocket. Then click "next."
4. Here you will need to select the "type," "external" or "internal"
5. Click "Internal (OSU student/staff/Group)," then select "OSU Student/Staff."
6. Click "Select a Person" and type in the name of the person who is being reimbursed.
7. If the person does not appear; click "Add a New Person." Enter their first name, last name and **OSU email address** and click "Create New Person."
8. Afterwards their ID number will automatically populate. In this instance Beaver Beaver isn't a real person so that will not populate.
9. Next, you will click "Add Address…," add their mailing address and then click "Add Address."
10. Then, select mail a check/direct deposit. You can enter special instructions/notes if you need to here.

11. Next select “Account Codes,” you will enter in the amount, provide a description on what was purchased, and select the appropriate account code. If the account code you need is not listed, please click other and fill the text box. To add more than one Account Code, repeat the process for each one. *[point out with cursor on screen]* If you find an error, you can choose to “edit” or “remove” the account code.
12. The next section on the form is “Expense Information.” It will ask you for the who, what, where, when, and why for the expense. You will answer the prompts via the text boxes.
13. Next, we will need to know the status of your receipts. Your options are: “I have all of my receipts,” “I have some of my receipts,” or “I have no receipts.”
14. If you have all of your receipts or have some of your receipts, you will be asked to upload the supporting documentation. These receipts must match up with the total amount from the account codes.
15. If you choose “I do not have all of my receipts, or I have no receipts” you will need to answer the “Lost Affidavit Questions.”
16. Last item is the authorized signers. Click “Select a Person” and choose one of the authorized signers from your organization. Your club can have up to five authorized signers. The Authorized Signer cannot authorize any payment/reimbursement to themself. If you need to update your authorized signers, reference our video about updating authorized signers.
17. Click “Next.” On the next page it will show if you have all the required fields complete. If you have all green check marks, then you are ready to click “Submit Submission.”
18. Lastly, if you have any further questions or concerns you can refer to our website (clubs.oregonstate.edu) for our office hours and contact information.

Internal Payment to an OSU Department or RSO

With your RSO Fund index, you are able to issue payment to another OSU Student Organization or OSU Department/Program. Below is a tutorial for how to use the form to pay an internal OSU Department or RSO. Link to Video Transcripts - https://beav.es/5Y8.

DISCLAIMER: Only those officers approved as an authorized signer will have access to payment authorizations. Additionally, you will need the receiving department or club index to be able to fill out the form.

1. Log into “**https://apps.ideal-logic.com/osusli**” and click on “OSU login” using your ONID login.
2. On your dashboard, click on “Finance & Accounting.” You will be able to see all funding requests and payment authorizations by your organization.
3. Click on “Payment Authorization” in the light green box on the top right. The payment authorization will appear with an option to either do a payment authorization or make an advance request.
4. Now you will need to select the appropriate form. A Payment Authorization is used to reimburse an individual for expenses incurred out of pocket, to pay a vendor invoice or initiate a journal voucher transfer to another OSU index. The Advance Request is to request funds from a RSO fund in advance of an expenditure.

5. To issue payment to other student organizations or OSU departments, a journal voucher transfer can be requested by clicking “Payment Authorization” and then click “Next”
6. Here you will need to select the “type,” “external” or “internal”
7. Click “Internal (OSU student/staff/Group),” then select “OSU department.” NOTE: this form considers OSU Departments and other student clubs as the same category.
8. Now, you will fill out the text boxes with the department name, department contact name, email address and the department index.
9. Once you are done, click “Journal Voucher” and put any special instructions into the text box. An example of a special instruction is if you need the recipient to receive the attached supporting documentation. You can leave this blank if you do not have any special instructions to add.
10. Next select “Account Codes,” you will enter in the amount, provide a description on what was purchased, and select the appropriate account code. If the account code you need is not listed, please click other and fill the text box. To add more than one Account Code, repeat the process for each one. [point out with cursor on screen] If you find an error, you can choose to “edit” or “remove” the account code.
11. The next section on “Expense Information” will ask you for the who, what, where, when, and why.
12. Next, we will need to know the status of your receipts. Your options are “I have all of my receipts,” “I have some of my receipts,” or “I have no receipts.”
13. If you have all of your receipts or have some of your receipts, you will be asked to upload the supporting documentation. These receipts must match up with the total amount from the account codes.
14. If you choose “I do not have all of my receipts, or I have no receipts” you will need to answer the “Lost Affidavit Questions.”
15. Last item is the authorized signers. Click “Select a Person” and choose one of the authorized signers from your organization. Your club can have up to five authorized signers. The Authorized Signer cannot authorize any payment, advance or reimbursement to themself. If you need to update your authorized signers, reference our video about updating authorized signers.
16. Click “Next.” On the next page it will show if you have all the required fields complete. If you have all green check marks, then you are ready to click “Submit Submission.”
17. Lastly, if you have any further questions or concerns you can refer to our website for our office hours and contact information.

External Payment (non-OSU) to a Vendor

With your RSO Fund index, you are able to issue payment to a vendor or service provider that is not within OSU. Below is a tutorial for how to use the form to pay an external non-OSU vendor. Link to Video Transcripts - https://beav.es/5Y8.

DISCLAIMER: If the vendor has not been set up in the financial information system, additional steps will be required to get them set up. The vendor will receive an invitation electronically requesting the information needed to make payment. Processing time for payment will depend on the responsiveness of a vendor. To find out if a vendor is already in the University’s financial information system, please contact student.orgs@oregonstate.edu

1. Log into "https://apps.ideal-logic.com/osusli" and click on "OSU login" using your ONID login.
2. On your club dashboard, in the light green box to the right, click on the "Payment Request form."
3. There will be two selections that show up. One is the RSO Payment Authorization and the other is RSO Credit Card Request. You will select the RSO Payment Authorization because you are reimbursing an individual for expenses incurred out of pocket. Then click "next."
4. Here you will need to select the "type," "external" or "internal"
5. Now you will need to select the appropriate form. A Payment Authorization is used to reimburse an individual for expenses incurred out of pocket, to pay a vendor invoice or initiate a journal voucher transfer to another OSU index.
6. To pay a vendor for any services like payment for goods or services used outside of OSU student/staff or departments click "Payment Authorization: and then click "Next"
7. Here you will need to select the "type," "external" or internal"
8. Click "External (Vendor)"
9. Afterwards, you will be asked to fill out the vendor's name, vendor ID, address, phone number and email into the text boxes.
10. Once you are done, click "Mail a Check & Direct Deposit" and put any special instructions into the text box. An example of a special instruction is if you need the recipient to receive the attached supporting documentation. You can leave this blank if you do not have any special instructions to add.
11. Next select "Account Codes," you will enter in the amount, provide a description on what was purchased, and select the appropriate account code. If the account code you need is not listed, please click other and fill the text box. To add more than one Account Code, repeat the process for each one. [point out with cursor on screen] If you find an error, you can choose to "edit" or "remove" the account code.
12. The next section on "Expense Information" will ask you for the who, what, where, when, and why.
13. Next, we will need to know the status of your receipts. Your options are "I have all of my receipts," "I have some of my receipts," or "I have no receipts."
14. If you have all of your receipts or have some of your receipts, you will be asked to upload the supporting documentation. These receipts must match up with the total amount from the account codes.
15. If you choose "I do not have all of my receipts, or I have no receipts" you will need to answer the "Lost Affidavit Questions."
16. Last item is the authorized signers. Click "Select a Person" and choose one of the authorized signers from your organization. Your club can have up to five authorized signers. The Authorized Signer cannot authorize any payment, advance or reimbursement to themself. If you need to update your authorized signers, reference our video about updating authorized signers.
17. Click "Next." On the next page it will show if you have all the required fields complete. If you have all green check marks, then you are ready to click "Submit Submission."
18. Lastly, if you have any further questions or concerns you can refer to our website for our office hours and contact information.

Purchasing Card

We are able to assist clubs that need to make online, pay over the phone, point of sale, or in-person transactions! This will be facilitated by a SOA owned purchasing card, which is just a fancy name for a credit card. We often refer to it as the P-card. There is no limit to how often you request to have a purchase made by the card. There are some expense limits, but often we can get an exception to make the purchase within a few days of the request being made. To check out the p-card, you will click on the payment request form and select the credit card and select the option that best fits what you are planning to purchase. Here is more information about the p-card policy. Link to Video Transcripts - https://beav.es/5Y8.

On your IdealLogic dashboard, in the light green box to the right click "Payment Request." Then select "RSO Credit Card Request" and then click "Next."

Then, the next step is that you will select one of the credit card options that best fits your needs. The first option is that the officer will visit the SOA Office or schedule a zoom to purchase items for online purchases or paying over the phone.

The next selection is checking out the credit card for in-store purchases in Corvallis or the nearby area.

The last one is to check out the credit card for club travel.

You will select one of the options and then it'll ask whether this is tied to an activity or not. If it is tied to an activity, the activity plan selector will populate and have you select an activity plan. If your activity you're trying to look for hasn't been submitted yet, please submit the activity plan before we continue.

The next question is, "Is this intended for an SOA Grant or not?"

Afterwards below this is the general SOA policy listing the general SOA policy regarding the credit card use.

You'll have to agree to the terms right here.

The next step is specific to this (selection). You'll fill in the date and time that you are coming in based on the available hours, the name of the business and the items you plan to purchase, and the estimated total dollar amount. Then, you will select an authorized signer to approve this. The person who is filling out the form can be the same person who authorizes this credit card use.

If you have any other questions or concerns, stop by SEC 108 or email student.orgs@oregonstate.edu.

CORE Reports

NOTE: If you want other officers to be able to access the RSO Fund account information, you will need to edit the officer title to include Treasurer (i.e., President is changed to President and Treasurer).

To be able to access CORE your club/org needs to be recognized for the 2022-2023 academic year. The club/org is recognized if you appear on our website in the public list of active clubs/orgs.

It does take 24 hours after changing an officer title or becoming recognized for the club database to update CORE access.

Recommendation:

We recommend that clubs keep their own tracking document related to their expenses! That way CORE is a tool to verify income/expenses and there is less risk of overcharging the account due to delays in posting.

Steps to Access CORE:

1. Go to core.oregonstate.edu
2. Sign in with your ONID credentials
3. Click on uReports
4. Scroll to the bottom of the page
5. In the Index search enter in your RSO Fund index and the Fiscal Year.
    - We are currently in Fiscal Year 2023. If you enter 2022 you can see the statement from last year.
6. Click Search
7. This will then populate a new tab that has your account information.

How to interpret your report:

- The current balance (not reflecting outstanding transactions is under the Actual title
    - The projected balance will summarize the year's transactions but is not the current balance of the account.
- In the Actual Column, you can see what Income or Expenses have been logged so far this Fiscal Year.
    - Click the blue links to see a list of transactions under each account code

Something isn't right or showing up?

- There can be a delay of items posting to CORE
    - If you want an update, you can email accounts.payable@oregonstate.edu.
- Very rarely income or expenses are placed in the wrong index.
- If you believe that to be true, please reach out to our office at student.orgs@oregonstate.edu with details on why you think an error has been made.

Here is the link to the CORE cheat sheet.

Deposits

Depositing funds to a club account

Deposits are made at the Cashiers Office
The Cashiers Office Windows are located on the first floor of the Kerr Administration Building, Open 8:30am to 4:30pm, Monday thru Friday, (Fridays during summer close a noon)

A few steps to complete a deposit for your organization at the Cashier’s Office

1. Count your deposit – cash and checks
2. Confirm information on checks if depositing
3. Fill out a deposit slip – highlighted fields on example
4. Deposit verified by a Cashier’s Office staff member
5. A receipt is provided for your records

To ensure your deposit is processed quickly and accurately:

- Review checks to ensure the amounts are accurately filled out
- Checks are made payable to “OSU” or include “OSU” in pay to line
- Checks are not older than six months (unless a specified time period on the check)

If it is not possible to bring the deposit to the Cashiers Office Windows

For a mailed deposit to be accepted, it must abide by the following:

- **ONLY** include checks/money orders (no cash)
- Must include a fully completed deposit slip with the deposit
- Mail to:

Attention: OSU Cashiers Office

PO Box 1086

Corvallis, OR 97339

SOA Grant Funding

What is SOA Grant Funding?

Student Organizations and Activity (SOA) Grants provide funding, through student fees, for organization events and organization development. This funding resource is only offered to recognized student organizations (RSOs) at the OSU Corvallis and Newport campuses. SOA maintains systems and processes that promote intentional use of funds that support diverse and inclusive participation in out of the classroom experiences and is committed to being a conscious steward of its allocation of student fees. SOA has an intentional program that utilizes these principles to define our work:

- The student experience is greatly enhanced through participation in experiential activities.
- SOA Grants provide education, systems, and resources to support student organization success and student engagement.
- SOA Grants provide access to funding to support the development and activities of recognized student organizations.

Who can request SOA Grant Funding?

Any RSO can request SOA Grant Funding that is affiliated with the Corvallis and Newport campuses.

Deadlines

Specific event/date of purchase deadlines

- It is highly recommended that all event/activity requests or organization development requests are planned as soon as possible. Allocations are made on a first come-first-serve basis. For example, you can request funding for Winter or Spring term in Fall.
- Submissions for less than $1,000 need to be submitted at least 2 weeks (14 days) in advance.
- Submissions for more than $1,000 need to be submitted at least 4 weeks (28 days) in advance.
- It is recommended that clubs wait until funding requests are approved before making purchases for events.
    - Since funding is not guaranteed, purchases made in advance of funding approval risk not being fundable or fully fundable.
- Requests received 13 (27 for >$1000) or fewer days in advance of the event/activity date or purchase date will NOT be reviewed.
    - **Why?** We need the time to process and get the funding to your RSO Fund index in time for you to use to make your purchases/process payment paperwork. Plus, events funding by SOA needs to be advertised in advance of the event date.

What can SOA Grant Funding be used for?

- These are the most common categories of requests. **This is not an exhaustive list.** While there are some categories that have a limit, we will consider all requests.
    - Labor Fees
    - Equipment Rental
    - Performance & Speaker Fees
    - Marketing
    - Supplies
    - Food
    - Decorations
    - Member professional development

- Conference/Competition Fees
- Travel
- Lodging

What cannot be funded?

- Payroll or payment to student organization members for leadership, service, etc.
- Hosting of activities for the primary purpose of fundraising for the organization or philanthropy for a non-profit agency.
- Hosting of activities for the primary purpose of raising awareness of or recruiting volunteers for a non-profit agency.
- Direct allocation of funds for philanthropic purposes - i.e., donating money or physical items (including food) to someone/something.
- Purchase of items for resale purposes.
- For events/activities hosted at establishments whose primary focus is on the service of alcohol (wineries, distilleries, breweries, etc.)
- Events/activities hosted on the OSU campus that include any access to alcohol.
- Promoting or opposing any political committee or any initiative, referendum, or recall petition, measure, or candidate. Political educational activities representing multiple viewpoints are fundable.
- Religious service activities.
- Personal membership dues.
- International Travel.
- Rental, maintenance, or upkeep of a facility.
- On-going, subscription payments.
- Any activity in which academic credit is an option for participants and/or billed through a student account.
- Youth engagement or outreach.

For more information, here is a link to our website, the full policy, and the quick reference cheat sheet:

- SOA Grant Policy Webpage
- SOA Grant Policy Document
- SOA Grant Policy Quick Reference Sheet

SOA Grant IdealLogic Walk Through

Process for requesting SOA Grant funds. Link to Video Transcripts - https://beav.es/5Y8.

A disclaimer before we start: If you want to learn about eligibility and criteria for SOA Grant funding, please go to clubs.oregonstate.edu/funding/soa to read the SOA Grant Policy for the academic year.

In addition, don't forget that we need the submission at least 14 days/2 weeks for requests under $1,000 and 4 weeks/28days for requests over $1,000. Requests received 13 or fewer days in advance of the event/activity date or purchase date will NOT be reviewed.

Now, let’s get started. Once you have logged into IdealLogic there are two forms that can be used. The first form is the activity plan form and the other is the Equipment Supplies Funding Request Form. If your request is tied to an event/activity you will select the Activity Plan Form. If your funding request is not tied to an event/activity, you will fill out the Equipment, Supplies Funding Request form.

We will start with the activity plan report. As you see, I am just clicking some of the boxes. Just because we are focusing on the most important parts that need to be selected.

When you scroll down to the bottom of the activity plan set up there's a heading called "Activity Cost". It will ask the question: 'Will you be spending any money in order to make this activity happen?" To request SOA Grant Funding or to request funding from any OSU department, you will have to click yes.

Once you click "yes," the Campus Funding tab populates. You will need to click "yes" on Campus Funding. Then, the SOA Grant options will populate. Select the category and then the SOA Grant tab for that specific category will populate. You'll click the tab on the left. Then, you will scroll to the bottom it will ask for the amount that is requested, the mission and purpose alignment and community building & belonging.

When you put in a number in the amount requested, this number will show up in the income box under the budget. When you scroll down to the budget, you will see that number has populated under SOA Grant Funding. If you would like to adjust that number, you'll go to the original SOA Grant tab and adjust the number. As you see, the amount before was 1,000 and we changed it to 800 dollars.

So, when we get to this area it is very important that you fill out the budget tab. For SOA Grants, we require something called cost demonstration. What cost demonstration can mean it can be a copy of an email, invoice, quote, or screenshot of a website as long as it includes the expense description, per-unit cost and vendor.

To add expenses, click add new category. Here, it will show you some main categories for expenses, but you can also create your own categories right here. Once I have chosen a category, it will populate into the expenses area. For the SOA Grant funding, you will go directly down to add button right here and you will click the add button again and it will populate with a pop up. You will put in a description of the item, the amount, the vendor and then the file. You will put in the file or the link to it.

We will do an example for this. The information I put in just now was that I am trying to order light bulbs. The cost of the item is $26.99 because the per unit cost is only $26.99. The vendor is Amazon and then I put the link in the notes box instead of a screenshot. Click add transaction. As you see, it will show 26.99 came up as an expense. You will keep adding expenses until it zeros out right here. So, in this case, I'm not using $800 so I will adjust that number here. The instructions for this area can be found at the bottom.

Now, we are going to transition to the "Equipment & Supplies Form." The Equipment Supplies Form is located on your dashboard in the light green form. You will click it. You will say yes and put in the description and date of purchase. Then, you will select the funding source. For Equipment and Supplies Request form, it will automatically choose Organization Development because that is the category that these requests fall under.

Click "select." Click "Next." Then you will put the amount you are requesting. Here, the income does not automatically show. Once you add an expense, it will show up, as demonstrated. As you see the $200 from above just showed up and just like with the activity plan you can adjust income value in the funding request area. Here we will add a cost demo. I do not have a screenshot/invoice for the Memorial Union, we will imagine that was put in here. Click "Add Transaction." Once you feel satisfied with everything you have put in, you will click next and go to the review area to see what you are missing. If you are not missing anything, you can submit your funding request. That's it for the tutorial today, if you have any further questions or concerns, please go to clubs.oregonstate.edu or contact us at student.orgs@oregonstate.edu

Clubs & Organizations Website

Here is a quick run through of the Clubs & Organizations Website. Link to Video Transcripts - https://beav.es/5Y8.

Welcome to the overview of the Club's & Organizations Website!

Here on the homepage, you are able to see some quick links for finding clubs or starting new organizations, a little about us, some information about ticketing and were not the only office to provide involvement opportunities, places we would like to refer you too. At the bottom of page, you can see upcoming events. If you would like to have your event posted in upcoming events when you are making the event in the OSU events page, select the clubs & organizations tag under the categories section.

Up at the top, you can find the about that tells you a little bit more about us, contact information for our staff, some info about accessibility and information about our parent organization, student experiences & Engagement. The next tab will tell you about finding a club on campus. If you are a club with a website or would like to view a club's website, then you can view here.
If you would like to create a new club, you would click here. If you are a club that has a website, when you view our club websites page. This is now where you are able to log in and edit your website. The next area on the website is manage club where you can see the official OSU policy around what constitutes a recognized student organization.

Some tips and guides on event planning, like food & catering, marketing, reserving space and programming FAQs. We have a little bit of information for advisors and are hoping to expand that in the future. We have information about the different club types. We have a quick link here to creating a new club. We also have information about data requests.

Another link area to find the website login for your club website. A data request is an email that is sent on behalf of the student organization to a specific population of students on campus. Clubs can make this two times per year, but one request per term.

Due note, it does take some time to make these requests. If you would like to make the data request form, you fill out Qualtrics form. The next area of the website is funding.
You can find some general guidelines under the funding area about SOA Grant Funding and funding from departments.

The first area will tell you about the AABC resource and finance forms. You can come here for the RSO Funds Guide to find information about making deposits, account codes and other useful tips and tricks. There is a quick link for RSO Fund Guide and SOA Grant Funding. This is where you can find the most up to date information about SOA Grant Funding. Note there are deadlines.

You can check out more information and there is a brief guide on how to make a request. You can download this to see the entire policy. The last two area is for Flat Tail Awards and Beaver Community

Fair. The Flat Tail Awards is an annual awards process that allows for peers to nominate their peers for achievement awards and club awards. Last, but not least is the Beaver Community Fair which has information about the fair.