



RSO Advisor Workshop

Training Content:

- What is an Advisor?
- How to Register/Create an RSO
- TigerZone & Important Forms
- RSO Handbook
- EMS Scheduling
- Food at Events
- Event Registration Form
- Risk Management
- Mandatory Reporter
- Campus
- Fiscal Procedures
- Money Management
- Solicitation of Funds
- Cash Handling
- Operational Assistance
- Student Organization Governance Board/Student Event Allocation Fund

Roles of the Advisor

- Take an active role in the student organization which they are serving.
- Have an accurate knowledge of organizational finances and procedures.
- Serve as a resource to students on University of Memphis policies and procedures.
- Serve as a liaison between the University of Memphis and the student organization.
- Challenge students to explore new interests and grow their organizations.
- Provide information on goal setting and development of the organization.
- Work with the organization leadership to establish frequency of advisor interactions.
- Understand the Student Leadership and Professional Competencies as laid out by Student Leadership & Involvement and encourage these students to understand how these competencies are applicable to the organization.

Advisor, Mentor, Problem Solver

How to Create/Register an RSO

- What you need:
 - 10 current Student Members
 - Constitution/Bylaws
 - Faculty/Staff Advisor
 - Meet with Student Organization Governing Council to set up an review process
- Register your organization on TigerZone

[\(\(TigerZone Registration\)\)](#)

TigerZone

- TigerZone is the premier organization management tool provided by the University of Memphis.
- TigerZone offers numerous benefits including:
 - Roster Management
 - Event Management
 - Document Uploads
 - Form Creation and Acceptance
 - Organizational Elections
 - Organizational Communications
- Organizations are HIGHLY encouraged to upload their complete roster into TigerZone, not just officers

[\(\(TigerZone Walk Through\)\)](#)

RSO Handbook

- The RSO Handbook can be found on the Student Leadership and Involvement website
- This handbook provides a one stop for all RSO needs
- This handbook should be the first resource student organizations visit when looking for answers and planning an event
- This Handbook also provides resources specific for advisors, including transition materials as well as 1-on-1 meeting questions

EMS Scheduling

- EMS Scheduling is handled by Conference and Event Services located on the 2nd floor of the University Center
- Each organization is allowed to have up to 5 EMS Schedulers listed for their organization
- To make a member an EMS Scheduler, simply update their membership status on TigerZone.
 - This does not automatically update them into the EMS Scheduling system, please allow up to one week for the system to be updated
- Event spaces may be reserved up to 6 months in advance and **MUST** be requested at least **ONE** week prior to your event
 - Note: outdoor sound must be approved through by the Dean of Students, please provide at least one month for the Outdoor Amplification to be approved

Food at Events

- The University has a sole source contract with Aramark, because of this the only catering option for food at events is Aramark
- The only exception is if the food being handed out cost less than \$200
- When serving food that cost less than \$200 the organization must fill out a Food Exception form that can be found on the Student Leadership and Involvement Website
- The form must be filled out 5 BUSINESS days prior to the event

Event Registration Form

- Starting in the Fall 2017 semester organizations must register every event in TigerZone
 - General Meetings do not count as an “event”
 - Advisors are required to approve events within in TigerZone to confirm the RSOs registration.
- Your event will not be registered until you complete this form on TigerZone, as well as book your space with EMS.
 - If you are having an event off campus and space is not needed, the Event Registration form must still be filled out

[\(\(Event Registration Walkthrough\)\)](#)

Risk Management

- Organizations are responsible for the Risk Management of their events
- When planning an event be sure to designate a member of your organization as a “risk manager”
- There is a Risk Management form on the Student Leadership and Involvement website that you can utilize in order to plan your event.
 - This form includes questions and planning space for inclement weather, inflatables, fire safety, police, etc.
- **NEW: Any event expected to have 300+ participants must have a police or security presence for the duration of their event. This applies to all events.**

Mandatory Reporter

Mandatory reporters are required by Title IX to report any reports of sexual violence to the Title IX office. This is outlined in University of Memphis policy UM1786.

A University employee who has the authority to redress sexual misconduct, who has the duty to report incidents of sexual misconduct, or whom a student could reasonably believe has this authority or duty. For purposes of this policy, the employees in the following list are specifically designated as Mandatory Reporters:

(1) President, Senior Vice President, Provost, Vice Presidents, Associate Vice Presidents, Assistant Vice Presidents; (2) Deans, Associate Deans, Assistant Deans, Directors, Associate Directors, Assistant Directors, Department Chairs/Heads; (3) Faculty and graduate teaching assistants; (4) Academic advisors; (5) **Advisors for student organizations including volunteers**; (6) Residence Hall/Housing staff including resident assistants; (7) Athletic coaches and trainers; (8) Employees who occupy a supervisory or management position, i.e. an employee who has the authority to hire, transfer, suspend, discharge or discipline employees or will have their recommendations given significant import; (9) Title IX Coordinator, Title IX Deputy Coordinators, and designees; (10) University Police; and, (11) Campus Security Authorities.

Locations to Report

- Office for Institutional Equity
 - 156 Administration Building
The University of Memphis
Memphis, TN 38152-3370
Tel: (901) 678-2713
Fax: (901) 678-4800
oiie@memphis.edu
- Office of Student Accountability, Outreach & Support
 - The University of Memphis
359 University Center
Memphis, TN 38152
 - Phone: 901.678.2298
Fax: 901.678.4534
 - studentconduct@memphis.edu

Campus Security Authority

The Clery Act recognizes certain University officials and offices as “Campus Security Authorities” (CSA), from which Police Services collects Clery crime statistics. The act defines these individuals, among other individuals, as “an official of an institution who has significant responsibility for student and campus activities, including , but not limited to, student housing, student discipline, and campus judicial proceedings. An official is defined as a person who has the authority and the duty to take action or respond to particular issues on behalf of the institution.

As a Registered Student Organization advisor, you are considered Campus Security Authority and are responsible for reporting criminal offense and violence per the Clery Act. While the University has identified a number of CSAs at the University of Memphis, we officially designate the following offices as places where campus community members can report crimes:

- Dean of Students, 359 University Center, 901-678-2187
- Office of Student Accountability, Outreach, & Support, 359 University Center, 901-678-2298
- Office of Institutional Equity, 156 Administration Building, 901-678-2713
- Vice President, Student Affairs, 235 Administration Building, 901-678-2114
- Senior Director, Human Resources, 171 Administration Building, 901-678-3573
- Deputy Athletic Director, 570 Normal, 901-678-2335
- Director, Student Health Center, 200 Hudson Health Center, 901-678-2287

Fiscal Procedures

- Each organization must designate an officer of the organization who is responsible for the collection and disbursement of funds and the maintenance of books and records.
- Each time an organization has a fundraiser, ticket sales, charity event, dues collection or anything for which money is taken, that organization must complete a **Solicitation of Funds** process.
- Any fundraising activity on campus shall be for the benefit of the organization as a whole or a charity, and no funds shall be distributed to the officers or members of an organization for personal profit or gain.
- The organization must provide for the distribution of all funds and assets in the event of dissolution.

Money Management

- Organizations may pursue any of the following in regards to managing organization funds:
 1. Set up an account with an off-campus financial institution such as First South Credit Union – University of Memphis branch
 - * Organizations using this option should take precautions to employ proper financial management procedures
 - * RSO Advisors should not be listed as signatories on the accounts, though they may be reviewers.
 2. Work with the Bursar's office and Accounting to set up an on-campus account
 3. Work with the Bursar's office to use Marketplace [an on-line system that will allow members to pay dues or deposit any other organization revenue with a credit or debit card]. **Please note that an on campus account is required for Marketplace.**
 4. Acceptance of Credit Cards:
 - Organizations that utilize off campus financial institution and chose to accept credit cards must be Payment Card Industry Compliant in order to process credit cards on campus. Proof of compliance must be submitted to the Bursar's Office.
 - Organizations that deposit their money through the University must be approved by the Bursar's Office to accept credit card payments.

Money Management

- If an RSO chooses to *work with the Bursar's office to set up an on-campus account*, here are some things you should know:
 - Request a University account through Accounting (Request for Banner Index Form)
<http://www.memphis.edu/bf/forms/finance.php>
 - All cash handling policies can be found at
http://www.memphis.edu/bursar/handling_guide.php
 - All cash handling personnel should have a copy of and be very familiar with the complete Cash Control Guide and follow appropriate procedures and will be required to take cash receipting online training and sign the “Credit Card Security Agreement Form”.
 - Organizations should contact Brenda Butler
bbutler@memphis.edu to discuss Bursar accounts.

Solicitation of Funds

- Anytime your organization has a fundraiser, ticket sales, charity events, or anything that money is taken for, you must complete a **Solicitation of Funds Form**.
 - This includes dues collection & any sort of t-shirt sales.
- You can find this form in the Student Leadership and Involvement Website under the Start/Manage RSO page.
 - The first page of the form is turned in BEFORE taking money
 - The second page of the form is turned AFTER taking money
 - Financial statement (2nd page) should be saved until after the event, and submitted with total \$ amount taken in.

Cash Handling

- RSOs intending to collect money should obtain the following: a safe/cash deposit box, deposit bags for large types of money, a register/pre-numbered receipt book, counterfeit money detector, a change fund, if necessary, a check endorsement stamp, if necessary
- Determine the plan for transportation of money to/from location of event. Make an approved list of people who will be handling the cash/currency.
 - First South has a dropbox at their current Highland location.
- Should prepare a collection process when receiving/handling cash at events. These items should be considered in the process:
 - Only one person per cash box/register
 - Check all dollar bill denominations \$20 and over with counterfeit pen.
 - Log every transaction via the receipt book.
 - Keep cash on hand to a minimum.
- If collecting checks:
 - Be sure name on check matches customer's ID
 - Endorse back of the check immediately with "For Deposit Only"
 - Keep a log of all checks collected
 - Be sure the written amount on the check matches the number amount on check.
- **NEW: If a student organization is collecting cash they must maintain a security presence for the duration the cash is on campus**

Cash Handling continued...

- **Reconciling:** RSOs should ensure that the amount of money on hand is equal to the total sales of items/donations collected.
 - The cash box/register should be reconciled against the receipts for that shift in order to identify any discrepancies.
 - Should have at least one independent person count the total cash collected prior to making any deposits.
 - Cash should be counted out of sight in a secure location.
- **Depositing:** RSOs should deposit any funds that are received to the student organization's banking account.
 - Make your deposits as quickly as possible. Do not wait to deposit money.
 - Be sure to transport cash in a discrete, non-see through bag.
 - Should always walk/travel in a group when making a deposit.

Tax Exempt Status

- RSO accounts maintained by the University in an 8 account can use the University's Tax Exemption Certificate. RSO's without a University account cannot
- Organizations Banking outside the University have the responsibility of ensuring compliance with all Banking and IRS Regulations
- If your organization would like to request a Tax Exemption form must email accountspayable@Memphis.edu and copy jcwilli@Memphis.edu, dnorman@Memphis.edu and cchambers@Memphis.edu
- The following information should be identified in the email request:
 - In the Subject area "Request for Tax Exemption Certificate"
 - Name of the RSO
 - RSO Agency (ledger 8) Index Number
 - Vendor (example: Target Store)
 - Vendor's specific address (example : 601 Colonial Rd Memphis, TN 38117)
 - Identify the general items to be purchased
- Please allow 2-3 business days for turnaround of the signed certificate.
- Each signed certificate is good for a single occurrence purchase. Future additional purchase(s) will require the submission of another request for tax exemption form.

Operational Assistance

- What is Operational Assistance?
 - Provides RSOs with basic funding for daily operation.
 - Groups can receive UP TO \$400 per Fall & Spring semester
 - Available on a first come, first served basis, only until funds run out.
 - No RSO is guaranteed funding as overall funds are limited.
- What can organizations use Operational Assistance for?
 - Printing at Tiger Copy & Graphics
 - Advertising with the Daily Helmsman
 - Office supplied at the University Bookstore (no food, clothing, gifts, or items for individual students such as scantrons)
 - Mail services
 - University Center charges
 - Police Services charges
 - Misc. RSO Supplies not available on campus**
- What can't organizations use Operational Assistance for?
 - Food
 - Gifts
 - Off-campus vendors
 - Reimbursement of money you already spent
- How is Operational Assistance accessed?
 - Get a pricing estimate & fill out the form completely
 - Fill out the online form, found on the Student Leadership and Involvement website BEFORE Spending funds
 - You will receive an e-mail when your form has been processed by SLI to pick up a proof of payment form
 - Present the payment form to the location where you are spending funds

No money is actually exchanged – we do not deposit funds into organization bank accounts.

**Please contact a MK Tyler for more information.

Involvement Ambassadors & Student Event Allocation

- The Involvement Ambassadors are the governing board for Registered Student Organizations
- The Involvement Ambassadors have the following 6 Duties
 - Review interested RSO's and provide recommendation to the Student Leadership & Involvement office for the creation, dissolution, or renewal of an RSO
 - Provide up-to-date reporting on number of registered student organizations and their status
 - Allocate RSO office space
 - Oversee & review RSO policies and procedures
 - Allocate available programming funds to RSO's through an application/interview process
 - Assist in the oversight of Tiger Zone, the online organizational management portal

Involvement Ambassadors & Student Event Allocation (Con't.)

- The Student Event Allocation process is managed by the Involvement Ambassadors.
- To apply for SEA Funding, organizations must be in good standing with the University and submit a completed SEA proposal via Tiger Zone.
- SEA monies can be used for speakers, lectures, dance performances, etc.
- More information on the SEA process can be found on the Student Leadership and Involvement website