



Cleveland State University
Student Organization
Resource Manual



Viking Creed

As a Cleveland State Viking,

- *I will practice personal and academic integrity and commit to life-long learning.*
- *I will act with civility and treat all people fairly, respectfully and with dignity.*
 - *I will embrace inclusion and diversity in all of its definitions.*
 - *I will respect individuals' freedom of opinion and expression.*
 - *I will make a positive impact on campus and in my community.*

*I pledge to foster the values set forth in the Viking Creed
and confront behaviors that may weaken the spirit of our community.*

The Center for Student Involvement reserves the right to modify, change, and update this manual as needed, including during the academic year. Please consult the web-based version of the manual for the most up-to-date version. Student Organizations are required to be aware of and abide by the current Manual.

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WELCOME

Thank you for being involved at Cleveland State University! We at The Center for Campus Engagement (CCE) are pleased to partner with you. Our purpose is to help your organizations achieve your goals and have fun! Please know that when questions come up this year - because they will – we are here to help you.

The Recognized Student Organization (RSO) Resource Manual provides an overview of organization functions, responsibilities, fiscal policies, and resources. Requests for exceptions to the following policy and procedures can be emailed to CCE at studentorgs@csuohio.edu. Organizations are required to follow the policies and procedures contained within this manual as well as university policies and the [Student Code of Conduct](#). Failure to follow policies could result in organization sanctions or suspension of organization operations.

CCE offers training throughout the semester for all officers and advisors covering the use of VikesConnect, Cleveland State University policies, the details of finances and funding, event planning, and other important topics. If you have any questions, please contact us at studentorgs@csuohio.edu. We are in the Student Center, room 343, and are open during normal university operating business hours.

JURISDICTION

RSOs must abide by all rules, regulations, policies, and procedures of Cleveland State University as set forth in, but not limited to, the Student Conduct Code, the RSO Resource Manual, and the laws of the State of Ohio. Cleveland State University rules and regulations shall take precedence over the organizational constitution and/or the rules of the regional, city, state, or national organization with which the student organization is affiliated.

EQUAL OPPORTUNITY AND NON-DISCRIMINATION POLICY

All RSOs must conform to Cleveland State University's Non-Discrimination Policy Statement that can be found on the website for the Office of Institutional Equity (www.csuohio.edu/institutional-equity).

HAZING POLICY

Cleveland State University has a zero-tolerance policy for hazing. No student should be subject to harmful, inappropriate, or coerced behavior to be a member or participate in Student Organizations at CSU. Hazing is against CSU's Student Code of Conduct and against Ohio law. Hazing is defined in the Student Code of Conduct as

“Hazing” - any conduct, act, method of, or coercion of another to do an act of initiation or admission into any organization, which occurs on or off university premises and which willfully or recklessly, causes or creates a substantial risk of causing physical or mental harm to any student or other person. Examples include, but are not limited to, extended deprivation of sleep or rest; forced consumption of food, liquor, other beverages, or drugs; beating or branding; forced exclusion from social contact; and/or forced conduct, which could result in embarrassment to any person. Any activity or behavior meeting the definition as described in this paragraph shall be considered a forced activity, notwithstanding the willingness of the individual involved to participate in such activity.”

Students AND registered student organizations who violate this policy will be reported to Student conduct and the appropriate authorities. If you wish to report an act of hazing, you can email magnusACTS@csuohio.edu or report anonymously at <https://secure.ethicspoint.com/domain/media/en/gui/42255/index.html> . If you have any questions or concerns about hazing, please contact the [Center for Campus Engagement](#) or [Community Standards & Advocacy](#).

VIKESCONNECT

All Cleveland State University student organizations are managed through the software system, VikesConnect (csuohio.presence.io). VikesConnect provides CSU with a centralized system for each RSO to complete the annual registration process, request funding, submit spending requests, reserve rooms and space on campus, make travel arrangements, store files, manage organization rosters, and many other communication and organization functions.

RECOGNIZED STUDENT ORGANIZATIONS (RSOs)

Cleveland State University student organizations are based on the interests of enrolled, degree-seeking students. While student organizations are encouraged to collaborate with CSU, community, and umbrella organizations, the organizations themselves must be student initiated, lead, and driven.

RSO status applies to all student organizations approved by CCE by meeting the requirements to start a new organization outlined below. Use of some privileges is limited to the amount of available space. Requests will be considered on a first come, first served basis from fully recognized organizations.

RSO privileges includes the following:

- Eligibility to apply for funding from allocating General Fee Units.
- Eligibility to request to reserve space and hold events on campus.
- Use of an Agency Account
- Each student organization is required to maintain an agency account through CCE. The agency account is funded through self-generated events held by the organization, such as fundraisers, dues, donations made to the organization, etc. This account does not hold funds allocated by a GFU.
- Student organizations are not permitted to have off-campus bank accounts except for University recognized North American Interfraternity Conference (NIC), National Panhellenic Conference (NPC), and National Pan-Hellenic Council (NPHC) fraternities and sororities whose membership dues cover property maintenance.
- VikesConnect portal which includes roster tool and communications tools, event calendar, electronic file storage, election tool and finance tool.
- Eligibility to request an organization banner be hung in the Student Center Atrium.
- Eligibility to utilize CSU duplicating (printing) services, as supported by RSO funds.

Starting an organization

To become a Recognized Student Organization, and to maintain RSO status, students must:

- Have four currently enrolled CSU students to fill the positions of President, Vice President, Secretary, and Treasurer, as well as a full-time CSU faculty or staff member to serve as the organization advisor.
 - The same individual may not hold more than one position within an organization.
 - Each student requesting a leadership position must meet eligibility requirements.
 - Organizations may not have more than one President, Vice President, Secretary, Treasurer, or Advisor unless approved by CCE.
- Each position holder will be required to complete training provided by CCE for their position.
- Have a constitution approved.
 - Use the constitution template found in the registration form.
 - Constitutions longer than four pages, including links to outside organizations, may take longer than ten business days to review.

- Submit the registration request through VikesConnect for recognition when organization registration is open.

When submitting a new organization request, the submitter must have the following information for each student officer and advisor: first and last name, CSU ID, and CSU email address. A constitution must also be submitted. **A constitution template is provided and found at this link:**

[https://www.csuohio.edu/sites/default/files/Constitution Template Updated 5-24.docx](https://www.csuohio.edu/sites/default/files/Constitution%20Template%20Updated%205-24.docx)

New student organization requests will be reviewed by CCE within ten business days of submission. New organization registration may be delayed or denied for duplicating the purpose of another organization, not completing/submitting the registration steps, violating CSU policies, denying membership to all currently enrolled and registered students in good standing that meet the criteria based on individual merit and qualifications established in the organizational constitution, and/or submitting a constitution longer than four pages, including links to outside organizations.

If a new organization registration is denied, the student who submitted the registration will be notified via VikesConnect. Students seeking understanding of a decision are encouraged to meet with CCE staff. Appeals of decisions regarding student organization recognition may be communicated by email to the Director of CCE within ten business days of denial.

Once an organization is approved, the student organization is responsible for maintaining RSO status throughout the academic year. RSOs that fall below Recognized Student Organization status because they have at least two, but less than four, individual students filling the President, Vice President, Secretary, and/or Treasurer positions will be transitioned to Emerging Organization status.

To submit a new organization application, go to: <https://csuohio.presence.io/form/organization-registration>

Organization Membership & Officer Eligibility

To be considered an active member in a CSU RSO, the individual must be a current degree-seeking CSU student in good standing with Cleveland State University who pays CSU student fees. Individuals who are not current degree-seeking CSU students and/or do not contribute to student fees are ineligible to be members of CSU student organizations. CSU faculty/staff members who are also degree-seeking CSU students may serve as an organization advisor, but they may not participate as a member of the student organization or hold student officer positions.

Students who wish to hold officer positions must meet the following eligibility requirements:

Undergraduate Students must:

- 1) Currently be enrolled for at least six (6) term credits at Cleveland State University
- 2) Have earned a 2.0 or greater GPA for the most recent Fall or Spring term
- 3) Have a 2.0 or greater cumulative GPA

Graduate, Law, and PhD students must be in good standing with their respective programs.

CSU students in their first semester at CSU are eligible to hold officer positions if they are currently enrolled in at least six (6) term credits at Cleveland State University.

Officer eligibility will be verified before any student takes office and midway through the academic year (after fall semester). Organization Presidents are required to demonstrate full understanding of both the President and Treasurer responsibilities. All officers must attend a training session offered by CCE. Advisors are strongly encouraged to attend training sessions too. Training sessions will cover position-specific officer or advisor responsibilities, university policies and procedures, and use of the VikesConnect platform. In the case of new officers being added throughout the year or for newly recognized organizations, you will be contacted by CCE to arrange officer training.

Replacing an Officer or Advisor

When a recognized student organization or emerging organization needs to update their officers or advisor, one of the current officers must submit the new individual's information in the Officer/Advisor Update Request form: <https://csuohio.presence.io/form/student-organization-officer-advisor-update-form>. To complete this form, the student or advisor's first and last name, email address, mobile phone number, and CSU ID must be provided.

Once the form is submitted, CCE will be notified and the student or advisor's eligibility to hold the position will be verified within **10 business days**. The submitting officer will be asked to confirm their organization followed the proper steps (outlined in their organization's current constitution) to replace an officer (or advisor) and may be asked to provide documentation the proper process was followed.

- If eligible, CCE will send the student or advisor notification. CCE will assign the officer or advisor position in the organization's page after completing mandatory training for officers. While advisors are not mandated to go through training, it is highly recommended they do so.

- If the student or advisor is ineligible to hold the position, the submitter will be notified. Due to FERPA laws, the reason for ineligibility will not be disclosed.

Officer updates submitted outside of this process will not be considered. This process is not to be used for new organization requests or for fall RSO registration.

Emerging Organization Status

An Emerging Organization status applies to all currently recognized organizations that fall below Recognized Student Organization status because they have at least two, but less than four, individual students eligible to fill the President, Vice President, Secretary, and/or Treasurer positions. Emerging Organizations must have a CSU faculty/staff advisor.

Emerging Organization status is to recruit new members. For RSOs that transition to Emerging Organization Status, event requests and reservations will not be accepted except for recruiting tables. Additionally, previously submitted funding requests will not move forward and/or may be denied. Previously submitted event/space requests and reservations are not guaranteed once an organization regains RSO status.

New organizations will not be approved with Emerging Organization status; RSOs that transition to Emerging Organization status may be active for the single semester in which they fall below RSO status. They are eligible to request to participate in Student Organization Fairs, Magnus Fest, and tabling in the Inner Link, as well as have a VikesConnect page. Recognized Student Organizations will be given preference over Emerging Organizations for event/space requests. Emerging Organizations are ineligible to utilize any other RSO privileges.

General Fee Units

A General Fee Unit (GFU) is a student group or Department that has a base budget General Fee funding from the University. GFU student organizations are identified by CSU and are governed by the General Fee Advisory Committee.

Allocating GFUs include Student Bar Association, Sport Club Council, and Student Government Association. Only recognized student organizations are eligible to request and request and receive funding. Please see the individual each organization's VikesConnect page for information, as well as procedures and timelines to request funding.

Student Organization Renewal (Transition Period)

All RSOs must renew their organization registration annually starting in the spring semester in accordance with the fiscal year. RSOs that hold elections in the Fall must complete the renewal process when new officers are elected and during the Spring. To avoid completing this process twice, it is strongly suggested that organizations hold officer elections in the spring unless otherwise mandated by national umbrella organizations (IE: Sorority and Fraternity Life organizations).

CCE will communicate the renewal process, timeline, and instructions to current student organizations leaders during the spring semester. Current student leaders will be responsible for sharing renewal information with incoming student leaders. Student organizations must complete the renewal process to be a recognized student organization and use their RSO privileges. If an organization fails to renew for two consecutive academic years, the organization's Agency Account funds will be transferred to the Student Life Account. To restart an organization that has not been renewed for two consecutive years, students will complete the new student organization registration process.

At the time of renewal, each RSO must identify an incoming President, Vice President, Secretary, Treasurer, and CSU Faculty/Staff Advisor. The same student may not fill more than one position in an organization. Please see "Student Organization Advisors" and "Officer Descriptions" for included responsibilities. Because each position is responsible for specific functions, organizations may only have one person fill each position; there may not be more than one President, Vice President, Secretary, Treasurer, or CSU Faculty/Staff Advisor.

It is highly recommended that as student organizations prepare to transition leadership, they utilize and follow the Student Organization Transition Plan, found at the end of this manual as an appendix.

Student Organization Suspension

A student organization can be suspended for actions such as, but not limited to, violations of the [Student Code of Conduct](#), failure to follow policies, ongoing failure to comply with deadlines, mispending funds allocated by General Fee Unit, and/or having an agency account in deficit.

A "Suspended" designation removes all Registered Student Organization Privileges and the VikesConnect account will be disabled for the duration. Previous event requests and reservations may be denied due to a suspension or funding requests; requests submitted during suspension will be denied. After an organization resolves its suspension in conjunction with CCE, its RSO rights and VikesConnect page will be reinstated. Previously submitted funding and event/space requests and reservations are not guaranteed.

RSO OFFICERS & ADVISORS

Officer Position Descriptions

RSO officers must meet the officer eligibility requirements. Please see "Organization Membership & Officer Eligibility" for details. If a lapse in officers happens, the organization automatically reverts to Emerging Organization Status. Instructions and guidelines for officers to access VikesConnect tools are located at the end of the RSO manual. CCE also offers in-person training each semester.

President

- Presides over meetings of the organization
- Serves as a secondary signatory on financial accounts
- Calls special meetings and/or executive meetings
- Assists all executive officers
- Prepares and files any report required
- Appoints committee chairpeople
- Maintains contact with organization advisor, alumni, affiliated university department or community partner, and/or with international organization Represents the organization to the campus community
- Serves as a spokesperson for the organization Approves all submitted event requests.
- Provides follow-up to organizational tasks
- Organizes executive board retreats
- Coordinates executive board officer transitions
- Represents organization at official functions
- Remains fair and impartial during organization decision making processes
- Provides encouragement and motivation to fellow officers and organization members

Vice President

- Assumes the duties of the President in his or her absence
- Coordinates constitutional updating and revisions in conjunction with leadership
- Facilitates election of officers
- Prepares and files any report required
- Organizes an end-of-year celebration
- Represents organization at official functions
- Remains fair and impartial during organizational decision-making processes
- Performs other duties as directed by the President
- Recruits new members

Secretary

- Obtains appropriate facilities for organization activities
- Keeps a record of all members of the organization
- Keeps a record of all activities of the organization
- Serve as the organization's recognition and appreciation coordinator
- Maintains organizational records, storage, and office

- Maintains attendance at all meetings
- Keeps and distributes minutes of each meeting of the organization
- Prepares and files any report required
- Handles all official correspondence of the organization
- Collects organization mail
- Prepares an agenda with the President for all meetings; distributes agenda to all members
- Notifies all members of meetings
- Prepares organization's calendar of events
- Represents organization at official functions
- Remains fair and impartial during organization decision making process
- Performs other duties as directed by the President

Treasurer

- Is familiar with accounting procedures and policies
- Serves as the primary signatory on financial accounts
- Coordinates payment of organization bills
- Maintains a financial history of the organization
- Provides advisor with summary of financial records at the end of the academic year
- Advises members on financial matters (i.e. vendors, ticket selling procedures)
- Collects organization dues
- Keeps all financial records of the organization
- Prepares an annual budget
- Keeps the organization informed of both organizational and university business
- Prepares and submits all allocation requests for funds
- Prepares and submits financial reports to the members
- Coordinates fundraising drives
- Maintains an inventory of all equipment and its condition
- Represents organization at official functions
- Performs other duties as directed by the President

Advisor

It is the student organization's responsibility to find an advisor for their organization. Student organization advisors must be current full-time or part-time faculty or staff members at Cleveland State University. Faculty/staff members on sabbatical, FMLA, extended leave, etc.; graduate assistants; and teaching assistants are ineligible to serve as advisors. The advisor role is solely

voluntary; no reimbursement by CSU, the student organization, individual, or other entity is permitted.

If an organization wishes to change their advisor or needs to find another advisor while theirs is on leave, the organization must do so within the parameters set forth in their constitution. If an advisor no longer wishes to serve as advisor, the advisor will notify the organization, and the organization must find a new advisor. Organizations must have an active advisor to maintain RSO status. If a lapse in advisors happens, the organization is inactive until a new advisor is identified.

While each advisor's relationship with their student organization may look different, they are all expected to maintain contact with the student organization on a monthly basis at minimum, offer guidance regarding organization function and finances, advocate for the organization, assist with policy interpretation, encourage adherence to CSU policy and procedure, and respond to event/space and funding requests. Also, organization advisors are the main contact for organization trips. If the advisor is unavailable to serve as the primary point of contact for organization trips, it is the organization's responsibility, together with their advisor, to find another CSU faculty/staff member to serve in that capacity. The primary point of contact for organization trips maintains contact with the organization as they travel, serves as liaison in the case of emergencies, and travels with the organization, if necessary.

Interpretation of Policy

As a representative of CSU, advisors should aid students with interpreting University policies and regulations pertaining to student organizations and may be a liaison to university administrators when the organization has questions about policies and regulations. The advisor should encourage the organization and its officers to learn about policies and regulations and to follow them. Advisors may need to remind the group of appropriate university regulations. When possible, the advisor should work with and through the organization's officers to maintain appropriate behavior standards.

Financial Guidance

An advisor should be available to review the organization's financial records. Advisors may need to educate the organization treasurer about the elements of simple bookkeeping. The advisor should help the organization develop a budget and maintain fiscal responsibility. An advisor should additionally be familiar with university and student organization guidelines.

Social Activities

The advisor may attend organizational social activities, when appropriate, to show support. By participation, advisors can help set the tone for these occasions, interact with members on an informal basis, and demonstrate their continuing interest in the organization's activities.

Organization Meetings

The advisor should attend special meetings as appropriate or possible to stay informed about organization efforts. The advisor should also meet periodically with the officers and assist in longrange organization planning and leadership development.

Duty to Report

Student Organization Advisors have a responsibility to report any forms of negligence or wrongdoing taking place within the organization. Once knowledgeable of a situation that would jeopardize members of the organization, themselves, or the University, advisors are strongly advised to contact CCE immediately. Examples of issues that can/should be reported include:

- Inappropriate utilization of allocated and/or agency account funds
- Students traveling who are unapproved
- Non-enrolled students participating as “members” of the organization
- Inappropriate events being held
- Inappropriate venues being utilized for student organization-sponsored events
- “Fronting” for other organizations - where an active group endorses an inactive group for an activity/event
- These concerns can remain confidential while seeking general guidance; as a university employee, it is expected that concerns will be communicated immediately to the appropriate colleagues on campus.

If a student leader is experiencing difficulties, is acting out of character, or raises cause for concern, please utilize the campus resources available (CARE) to report their behavior, circumstance, or activity by emailing your concern to MagnusACTS@csuohio.edu.

Examples of issues that can/should be reported include:

- Missed classes, poor grades on exams, assignments and projects, poor attendance
- Personal concerns or health
- Financial issues
- Discrimination, assault, threat, hazing, etc.

For more information or to seek guidance on an issue, please contact The Center for Campus Engagement, located in the Student Center, suite 343 or email studentorgs@csuohio.edu

RSO Fiscal Officers

Responsibilities Of the Fiscal Officers

While procedures are usually specific to the type of activity or transaction an organization wishes to initiate, there are general principles that financial officers should consider when acting in their official capacity. These include:

1. Keep detailed and easily accessed records on VikesConnect.
2. Review each transaction and its supporting documentation before submitting.
3. Maintain internal educational and compliance systems to ensure all members are aware of the policies and procedures the organization must follow.
4. Emphasize to members that participation in the group does not require the spending of personal funds on purchases for the organization and its programs. However, should unforeseen circumstances arise, where the group is faced with a lack of payment alternatives due to the specific nature of an event, a member may be authorized to use personal funds provided that the treasurer reviews reimbursement requirements with the member and initiates the reimbursement process with the Budget Officer shortly after the purchase is made. Failure to adhere to CSU purchasing and refreshment policies will not result in reimbursement.
5. Students do not have the authority to enter, sign or otherwise approve contracts. Only designated University personnel may sign contracts, and only after receiving approval by the University's General Counsel.
6. Maintaining frequent contact with university resources; the Center for Campus Engagement, CSU Catering, Conference and Event Services, and the Student Life Budget Officer, may help establish relationships that can assist officers in planning and anticipating needs and requirements.
7. Ensure orderly administrative transitions with Outgoing and incoming officers by completing forms and training with Student Life promptly.

Treasurer & President

The group's treasurer and president are the only organization representatives with whom the Budget Officer may conduct business. Student Organization financial requests are only authorized by the treasurer of the group, or the president if the treasurer is unable.

Both the treasurer and president are personally responsible for the funds within the organization's account, and as a result, each should complete financial training to ensure they are following University policies and procedures. It is important to note that personal responsibility includes making up shortages or deficits using one's own personal finances if needed.

The treasurer or president must authorize all group financial transactions by submitting financial requests in VikesConnect. Once authorized by the treasurer or president, the request needs to be reviewed for approval by the advisor before the transaction is processed.

Advisor

The organization's advisor is an important resource. Both an advocate for the students and a representative of the University, the advisor's input can often help officers broaden their perspectives on projects, while her or his approval for financial requests expedites the transactions that support them.

With respect to financial transactions, advisors must verify that expenditures are meeting university standards and that their groups are following University policies and procedures. The Budget Officer relies on advisors to attest to their propriety by approving financial requests submitted by the student organizations.

Advisors are not allowed to submit financial requests on behalf of the students, only the treasurer or president can submit financial requests.

RSO AGENCY ACCOUNT

A registered student organization's Agency Account is their main account within the University accounting system. Funds deposited into these accounts represent funds earned and/or raised by the registered student organization.

Effective October 1, 1982, the Board of Trustees resolved that student organizations must maintain:

- **A student organization agency account through the University Controller for the following funds:**

Those generated from fund-raising events held at the University;

- Those generated through fund-raising activities in which the organization uses the University's name;
- Dues, excluding fraternal organizations where dues include an assessment for maintenance of real property;
- Any other funds derived from affiliation with the University.

- **Delimitations/Prohibitions:**

- No student organization, except for general fraternities and sororities whose dues cover property maintenance, are permitted to have an off campus checking or savings account;
- Agency accounts shall not be used to transfer or deposit any university funds, in addition to any personal activities or social events, i.e., purchase of goods (microwaves, refrigerators, etc.) by individuals for personal use, or to fund social events – of a personal nature – i.e., birthday parties, baby showers, etc.

All RSO Agency Accounts must be sponsored through the Center for Campus Engagement. CCE will monitor and approve all expenses for the agency account. Agency accounts must always have a positive cash balance.

Opening An Agency Account (Starting a new organization)

To open an account within CSU, a student organization must be a registered organization. Once a group has registered for the first time, a CSU agency account will be created for the organization. Please refer to the “Starting an Organization” section in this manual for more information.

Renewing An Agency Account

Use of your agency account will end on June 30th of the fiscal year, when the group may renew registration for the upcoming year. If an agency account is not renewed after a two (2) year period, remaining account funds or deficits will be transferred to the Student Life Account.

RSO Agency Account Number

Each organization has one account and a corresponding 13-digit account number. All account numbers follow the “8405-0890-xxxx-xx-**12345**” format. The last five digits are what distinguish one organization’s account from another’s. Organizations can find this number in VikesConnect by clicking into the group’s Details section of their page from the Admin Dashboard. The five-digit number is below your constitution. Student officers should place their organization’s complete 13-digit account number on all paperwork to ensure that accounts are correctly credited and debited.

Agency Account Statements

Current balances may be accessed through each group's VikesConnect portal within the Finance tool. Your organization's treasurer may request the group's University Peoplesoft Transaction Register when needed to see if any internal charges have hit their account. The treasurer should be reconciling the group's account monthly. **Please note:** Any discrepancies should be reported immediately to the Budget Officer at studentorgfinance@csuohio.edu.

Agency Account Deposits

If your organization raises money through a fundraiser, donation, or membership dues, the cash and checks need to be deposited into the organization agency account within 24 hours. If your organization collects money during a weekend, then deposits are made the following business day (typically Monday but check the university calendar for holiday closures). For organizations that cannot deposit funds after their event may request a lock box for cash and checks until they can be deposited. Checks to your organization need to be made payable to "Cleveland State University", your student organization name should be noted in the memo section. All other checks will not be accepted. To deposit funds, Treasurers can create a deposit using the [deposit tool in VikesConnect](#).

Deficit Balances

A deficit is an over-commitment of resources by an organization. It may reflect a breakdown in communication within an organization or with vendors, poor planning, or a timing issue out of their control. Student officers should try to anticipate problems by ensuring that:

- They know what the institutional deadlines are and that their group's benchmark dates are set well before these deadlines;
- All their members are aware of the spending and documentation requirements— prior to authorizing them to make purchases on behalf of the organization;
- They take advantage of available resources (including the Budget Officer) in the early planning stages of an activity.

A negative balance in an account will warrant that the organization be suspended until funds are deposited into the account to cover the deficit.

STUDENT ORGANIZATION ALLOCATION (FUNDING) REQUESTS

General Fee Unit Allocating Organizations

Funds used for allocations to RSOs are derived from the General Fee. The General Fee is paid each term by all students and granted each year by the General Fee Advisory Committee (GFAC), under the direction of the Vice President for Student Belonging & Success or designee. These are Public Funds and must be allocated and spent in accordance with state regulations and University policy.

SGA, SBA, and SCC may develop additional guidelines, but the procedures listed in this document cannot be changed in any way. Treasurers of student organizations are encouraged to meet with the treasurers of SGA/SBA/SCC as applicable to clarify their allocation guidelines.

Requesting Budgets (Funding from SGA, SBA, SCC)

Student Government (SGA), Student Bar Association (SBA), and Sport Club Council (SCC) shall set their own guidelines for distribution of funds to recognized student organizations.

RSO allocation requests must be submitted to the SGA, SBA, or SCC treasurer as appropriate. The SGA/SBA/SCC treasurer will discuss funding requests with organization representatives. Each respective Finance Committee, headed by the SGA, SBA, or SCC treasurer, will review funding requests and recommend the exact dollar amount to be allocated to each funding request submitted by a recognized student organization. The SGA/SBA/SCC bodies will make final approval for student organization allocations, and the SGA/SBA treasurer will notify each organization of the allocation decision.

Student organizations may request budgets that are consistent with their organizational purposes (as defined in each constitution under “II. Purpose of the Organization”), from SGA, SBA, or SCC for the following:

1. Equipment to be purchased from funds allocated by SGA, SBA, or SCC must be for use by the organization. It must be equipment to be used on a continual and non-personal basis. All equipment should be stored at the University when not in use and must be listed each year on an inventory sheet. All such equipment is property of the University.
2. The use of office supplies funded by the University must be directly related to the student organization's purpose.

3. For any organization to receive support from SGA, SBA, or SCC for publicity and/or promotion, such publicity and/or promotion must specifically relate to the organization or programs/projects of the student organization.
4. All special projects must be presented in full detail, for review by SGA, SBA, or SCC. All project requests should specify the basic programming plans of the organization, i.e., films, speakers, campus tours, lectures, conferences. A budget breakdown via email should be sent to the SGA, SBA, or SCC treasurer including quotes, invoices, screenshots or any type of documentation explaining the amount being requested.
5. Requests for travel funding must be limited to those conferences, conventions, meetings, or events which relate specifically to the purpose of the student organization. Participation will be limited to officers or authorized representatives of the organization. No travel request may in any instance exceed the amounts or violate the regulations set forth in the [CSU Travel Policy](#) or [RSO Travel Policy](#). Appropriate travel paperwork must also be completed with the Center for Campus Engagement before travel by any student organization. Travel requests should be submitted ahead of time as ***travel forms should be completed at least 45 days prior to travel.***
6. Organizations shall not pay salaries or benefits of any kind for duties rendered by their members with funds allocated by SGA, SBA, or SCC.

**A group cannot spend from a budget until it has been approved in VikesConnect by the advisor and SGA, SBA, or SCC treasurer.*

Allocation (Funding) Accounts

If your organization has received an approved budget from the Student Government Association or Student Bar Association, the funding is put into a temporary account for the group to spend from called a sub-budget. Each organization will have separate allocation sub-budgets for their requests.

For example, organizations who receive funding from SGA will have an event allocation budget, a travel allocation budget, other needs/supplies allocation budget and a one-time \$150 allocation budget.

- The Fake Organization ↗	\$1,650.00	\$1,650.00		⋮
Agency Account	\$0.00	\$0.00	12345	⋮
- SGA Funding	\$1,650.00	\$1,650.00		⋮
SGA Event Funding	\$1,500.00	\$1,500.00		⋮
SGA Travel Funding	\$0.00	\$0.00		⋮
SGA Other Funding	\$0.00	\$0.00		⋮
One Time \$150 Funding	\$150.00	\$150.00		⋮

These accounts are connected to the main GFU organization allocation budget that approved the budget request. Each registered student organization has their own sub-budget accounts associated with the GFUs they can request from. Your group can spend the funds within the approved budget by using the Finance tool to submit a “Create Expenditure” within your approved budget for payments and/or reimbursements. The group will need to choose the correct account to spend from within the purchase request. All the same general policies and procedures must be followed for payments and reimbursements using approved budget funds.

The approved budget can only be used for what it was requested for. Any leftover funds will be transferred back into the main GFU allocation budget to reallocate to other groups. This transfer will happen 30 days after the day of the event or return date of travel.

Video instructions on how to submit an allocation request and an expenditure request can be found at: https://www.youtube.com/watch?v=M_6kM48oGpY&t=173s

USING AGENCY ACCOUNT/ALLOCATION (FUNDING) AWARD

Fund Restrictions

University [purchasing policies](#) have been developed consistent with state law to ensure a fair, efficient and competitive purchasing process. The purchasing policies must be followed regardless of fund source. Funds that student organizations use, whether earned through fundraising or received by an allocating organization as an award are restricted by University policy.

NOTE: In the instances where an organization needs to split payment between the agency account and funding account, two separate purchase requests will need to be submitted in VikesConnect.

The more general restrictions include:

- Student organizations at CSU are not allowed to establish or maintain off campus banking accounts without specific authorization from the University Controller's Office.
- Undergraduate student groups may not use organizational funds to purchase alcoholic beverages, tobacco products or related items.
- All donations or fundraising by registered student organizations on behalf of third parties must be vetted by the University before such activities are scheduled or occur. Monies accepted for deposit in agency funds are not considered tax deductible gifts to the University.
- Student organizations at CSU may not use allocated funds to support any candidate for political office.
- SGA Funds: Student Organizations that receive funding from the Student Government Association are subject to additional restrictions based on the allocating body's mission and funding guidelines. Questions regarding these restrictions should be directed to the organization Treasurer.

The University Procurement Process

The steps below provide a step-by-step guide to successfully following the purchasing policies for all University purchases:

Step 1: Determine what you need to purchase. The purchase of certain goods and services have additional requirements as well as those listed below.

Step 2: Contact the Budget Officer to determine whether an existing University contract, state contract or cooperative purchasing group contract exists under which the purchase can be made. If so, the competitive selection process is considered satisfied, and the next step is the contract review process. Contact the Budget Officer with any contract-related questions at studentorgfinance@csuohio.edu.

Step 3: Determine how much the purchase will cost.

Step 4: Based on the value, determine the process that must be used.

- If the purchase will cost \$2,500 or less, it is exempt from the competitive selection process. You can go straight to Step 5.
- If you are purchasing **goods** valued between \$2,501 and \$24,999, obtain at least three (3) quotes.

- If you are purchasing **services** valued between \$2,501 and \$49,999, obtain at least three (3) quotes.
- There are exemptions from the competitive selection process. Contact the Budget Officer prior to making a purchase if you believe that there is only one supplier for the product (sole source) or if it is an emergency. The Budget Officer will guide you on following the waiver process for purchases at or above the bid threshold.
- Do not artificially break up purchases to come under a competitive purchasing threshold. For example, if you will use one vendor's services periodically throughout the year, determine the total value for the fiscal year and use the appropriate purchasing process.

Step 5: Submit your preferred vendor request to the Budget Officer. Depending on the competitive selection process used, you will submit your quotes / bids / proposals through VikesConnect for approval. Once approved, the Budget Officer will submit in MagnusMart for Purchasing Services approval. If Purchasing Services approves your preferred vendor, a Purchase Order (PO) will be generated, and sent to the vendor. Do not confirm any purchase with a vendor until it has been approved by Purchasing Services. Goods / services may not be received by the University until the vendor has received a PO.

Step 6. Once the purchase has been approved by Purchasing Services, the procurement process is complete.

Step 7. Receive your goods/services, and send a final receipt/invoice to the Budget Officer.

Payments

Payments should be the primary transaction used by RSOs to meet monetary obligations associated with invoices, club registrations, dues, services rendered or contractual agreements. Payments must not include Ohio sales taxes and must follow the University Procurement Process.

RSOs should always try to pay for expenditures directly from their CSU agency account in the form of a check from the University, to avoid spending out of pocket. Always plan purchases ahead of time. To make a payment from the RSO's Agency Account or approved budget from an allocating organization, the treasurer or president must submit a "Purchase request" for payment in VikesConnect.

Contact the Budget Officer at studentorgfinance@csuohio.edu to ensure RSOs know what is needed for each purchase.

Documentation Needed For A Payment

The backup for payments may require the following:

Non-Contractual Payment: (If the payment is over \$2500, RSOs need to follow the competitive selection process. Three (3) quotes from additional vendors will be needed.)

- Quotes or Order Forms
- W-9 IRS Form

Contractual Payment: (If the payment is over \$2500, you will need to follow the competitive selection process. Three (3) quotes from additional vendors will be needed.)

- Contract: Vendor Contract - If off-campus. Any agreement that needs a signature for terms and conditions. (Ex: Rental Agreement)
- [CSU Special Event Agreement Contract](#)- If on-campus (Ex: inflatables, photo booths, special services, caricature artists, Photographer, etc.) May be Subject to City of Cleveland Entertainment Tax
- [CSU Performance Agreement Contract](#)- If on-campus (Ex: Non-Educational Speakers, DJ, Bands, etc.) Subject to Entertainment tax in Cleveland, OH

Contracts

A contract is “an agreement between two or more parties creating obligations that are enforceable or otherwise recognized at law.” Black’s Law Dictionary (10th ed. 2014) In other words, a contract is a promise the law will enforce.

Because a contract is between the University and the person(s) contracted, there are four (4) preliminary items to keep in mind:

1. Students may not sign contracts.
2. An authorized University Official must sign all contracts.
3. Personal funds should never be used to pay for contracted services. Under no circumstances will they be reimbursed.
4. All contracts should be submitted 45 business days before payment is needed.

Contracts executed without Office of General Counsel (OCG) review and approval may be deemed outside the student’s authority and result in personal liability for the contract.

Using a Vendor's Contract

Rule 3344-65-11 of the University's Purchasing Policies mandates that all contracts to which Cleveland State University is a party must be "reviewed and approved as to legal form" by the Office of General Counsel prior to execution.

If a group is having an event off campus and needs to make a payment to the vendor using the vendor's own contract (Ex: Rental Agreement), the contract will need to be reviewed and approved by the Office of General Counsel, which can take over 2 weeks. The full procurement and contract review process from start to finish can take up to 4 weeks.

Using A CSU Contract Template

Office of General Counsel has approved contract templates available for use and they do not have to be reviewed by OGC prior to signature by authorized CSU signatory because these templates are already approved as to legal form.

- [CSU Special Event Agreement Contract](#)- If on-campus (Ex: inflatables, photo booths, special services, caricature artists, Photographer, etc.) Subject to Entertainment tax in Cleveland, OH
- [CSU Performance Agreement Contract](#)- If on-campus (Ex: Non-Educational Speakers, DJ, Bands, etc.) Subject to Entertainment tax in Cleveland, OH
- [CSU Professional Services Agreement Contract](#)- If off-campus (Ex: Rental Space, all Performance and Special Event examples but for off-campus.)

Caution: (1) the procurement process through the Purchasing Services Department must be completed first; and (2) if any change other than filling in the blanks is made to the OGC approved templates, the contract must be submitted to OGC for review and approve.

For further information regarding University Contracts, visit the Office of General Counsel's website at: <https://www.csuohio.edu/general-counsel/contracting-csu>

Entertainment Tax

As required by the City of Cleveland ordinance 191.1302, all payments made through CSU's Accounts Payable for the services of any entertainer, entertainment act, speaker, sports event,

promotional booth, special event, band, orchestra, theatrical performance, promoter, or booking agent for any of the above shall be subject to a deduction of two and one half percent (2.5%) for Cleveland tax withholding.

Donations

Giving a Donation

To donate from a student organization's agency account requires that the organization submit a request for payment, which should include the following:

- A typed letter or memo formally expressing the group's intention to donate and should include the amount, the organization's name, address, and Federal Employee ID Number (FEIN#), and/or cause that will be the recipient of the intended donation.
- The letter/memo should be signed by both the Treasurer and the President.
- A W-9 from the organization the donation will go to.

Some allocating organizations do not allow the use of their funds for donations (i.e. SGA).

Receiving a Donation

If your organization is receiving a donation, the vendor may request the University's Federal Employee ID Number (FEIN), but the University is not able to provide a formal tax write off letter. This is because the University is a state institution and not a non-profit 501(c)(3) organization. CSU EIN is **34-0966056**

SHOPNET (ACCEPTING CREDIT/DEBIT CARD PAYMENTS)

[ShopNet](#) is used by Cleveland State University departments to allow customers to select and pay for a variety of items on the web using their credit card. Recognized CSU student organizations may submit a request to set up a ShopNet item to accept payments for things such as organization dues, application fees, event entrance fees or other organization items.

The ShopNet form is available through Service now. To access information and instructions on filling out the form you can click on this link <https://www.csuohio.edu/services-for-students/shopnet> or go to the **IS&T homepage and click on the ShopNet request** tab on the left hand side.

Any questions and/or correspondence for ShopNet can now be sent to ShopNet@csuohio.edu

FREQUENT TYPES OF SPENDING/PURCHASES OTHER THAN FOOD

Before RSOs make purchases for their group, review the requirements for specific purchases. In addition, because CSU is a state institution and does not pay state sales tax (see Tax-Exempt Status section), whenever possible, CCE encourages organizations to have our office make the purchases. RSOs should avoid spending member money and being reimbursed whenever possible.

Tax-Exempt Status

Cleveland State University is a state institution in the state of Ohio. The University is exempt from State of Ohio Sales Tax. When approving expenditures, student officers should always consider the tax implications involved. The University is exempt from paying Ohio sales tax. This tax-exempt status is extended to registered student groups that make purchases for appropriate University purposes (not personal use). A letter outlining the University's tax-exempt status can be found on the University website. Organizations may request a sales tax exemption form by completing a request in VikesConnect at: <https://csuohio.presence.io/form/student-organization-state-of-ohiosales-tax><https://csuohio.presence.io/form/student-organization-state-of-ohio-sales-tax-exemption>. **Consistent with University policy, the Budget Officer will not include Ohio sales tax in payments, nor will Ohio Sales tax be reimbursed to individuals.**

Student officers should keep in mind that their organization's exemption from paying tax is not absolute. Tax obligations due to a state other than Ohio or from activities other than purchases may still apply—e.g., the sales tax from a purchase in Pennsylvania. These expenses/expenditures may be included in payments or reimbursed to individuals acting on the student organization's behalf.

Clothing And Promotional Items (Including Banners/Table Coverings)

Student Organizations must use one of the [three \(3\) approved IUC vendors](#) for custom printing or embroidery on items like shirts, hoodies, hats, pens, button, stickers, banners, etc. Follow the instructions below:

Step 1: Contact one of the [approved IUC vendors](#) to obtain a quote (not an invoice). Do not place the order

- If the approved vendors do not offer a product/price you need, you must supply written documentation from all 3 approved vendors in addition to the quote from the vendor you wish to use.

Step 2: Create Expenditure in VikesConnect. Select (Payment) Clothing/Promotional Items category. Make sure to include the quote(s). Once approved by the group's advisor, the Budget Officer will submit the order in MagnusMart to receive a purchase order (PO#).

Step 3: Once the PO# is received by the vendor, they will start production.

Step 4: After the order is received, CCE will do the final approval of the expenditure request.

Gift Card Purchasing and Use

Student organizations wishing to purchase gift cards to use as prizes must be aware of [university Gift Card guidelines](#). In addition:

1. Gift cards are not to be used in lieu of payment for goods and/or services or to compensate for work performed. Use the correct contracts/procedures for payments.
2. When creating the expenditure in VikesConnect to order gift cards, make sure to select (Payment) Gift Cards.
3. Be aware we will need permission from the university's accounts payable office to purchase the cards first. This may take additional time, therefore plan accordingly.

Printing And Duplicating (posters, hot cards, fliers, etc.)

All printing must be done by a vendor with a production facility in the state of Ohio per [the CSU printing policy](#).

Step 1: Select a vendor to obtain a quote

- Ohio vendor: Brothers Printing, CopyMax, etc.
- CSU Duplicating Services: Submit the [RSO Printing/Duplicating Request form](#) in VikesConnect.

Step 2: Submit Expenditure Request (Payment) in the organization finance tool and upload the quote/order form.

Step 3: Once the request is approved by the group's advisor, the Budget Officer will process the order:

- Ohio Vendors: The Budget Officer will submit the order through MagnusMart to receive a purchase order (PO#).
- CSU Duplicating Services: The Budget Officer will inform Duplicating department if the group has sufficient funds in their account or their funding award to complete the order and make sure the correct account number is used.

Viking Outfitters (CSU Bookstore)

If you wish to purchase items from the bookstore using either your agency account funds or funding award funds, follow the steps below:

Step 1: Create and expenditure in VikesConnect, including a list of needed items, their prices, and the estimated total.

Step 2: After the request is approved, the budget officer will make the purchases.

Step 3: Pick up items from Budget Officer

Online Purchases

RSOs are strongly discouraged from ordering anything from online retailers if possible. Because CSU does not pay state sales tax, any order placed online (for example, Amazon.com), the purchaser will pay sales state of Ohio tax and not be reimbursed for tax they pay. The Budget Officer has set up tax exempt accounts with online retailers and can place orders for organizations. **NOTE:** If we have not done business with a particular online retailer you wish to use, we will need additional time to set up a tax-exempt account.

Amazon purchases:

NOTE: As of May 9, 2022, we are no longer permitted to place orders for Amazon using our sales tax-exempt account. **In addition, Cleveland State University WILL NOT reimburse students for any purchases made on Amazon.com.** We are required now to go through Amazon Business which is a punchout vendor in MagnusMart. Please follow the same steps outlined below for Online Purchases:

If an RSO needs to place an online order, follow these steps:

Step 1: Select items you wish to purchase and place into your shopping cart

Step 2: When all items needed are in the shopping cart, take a screen shot of the cart to use as a quote.

Step 3: Submit a Purchase Request in VikesConnect Finance tool. Attach shopping cart “quote”.

Step 4: The Budget Officer will place the order. When items arrive, the organization will be notified to pick up the items in the CCE office.

NOTE: Students ordering items themselves for delivery must have the order delivered to Cleveland State University, NOT their own private residence.

In-Store Purchases

There may be times when an RSO needs to make purchases of items at local stores. In these cases, the student will pay for the item and be reimbursed later (see Reimbursements for more information). **In these cases, students are reminded that CSU does not pay state sales tax and will not reimburse students who pay state sales tax.**

In those instances, RSOs should complete a [Tax Exempt Request Form](#) in VikesConnect for every store they plan to shop. Once submitted, the Budget Officer will complete the tax exemption form and send it to the individual who requested it. The completed form is taken to the store to be exempt from paying state sales tax.

Reimbursements

A reimbursement is a withdrawal from an organization's account with the purpose of paying a person back for personal funds used to help facilitate a group activity. The amount paid back will be in the form of a check. These reimbursements are not limited to officers of the organization. Non-administrative members may also be reimbursed for personal fund outlays if the expenditure is for an authorized group activity and has been approved by the group's president or treasurer.

Before authorizing someone to spend personal funds, however, officers should inform the person of the restrictions and receipt requirements necessary for reimbursement. This is particularly important, because *reimbursements may be rejected without proper documentation and charge specificity.*

For federal income tax purposes, all people who provide services for a group must be paid directly by check from the organization's CSU agency account and subsequently issued a Form 1099-MISC. (Ex:

Photographer, Performer, Balloon Artist, DJ, etc.) Reimbursements will not be issued to group members who pay these individuals with their own funds.

To receive a reimbursement from your group's Agency Account or approved budget from an allocating organization the group treasurer or president must submit a "Purchase request" for reimbursement in VikesConnect.

For reimbursement purposes, receipts should be submitted within 15 days of the event's completion. An expenditure should be created in VikesConnect.

Documentation needed for Reimbursements:

- Original itemized receipts

- Copy of the debit/credit card statement listing the charge and the name of the account holder requesting reimbursement (if payment made via debit/credit card).
- List of attendees (if food was purchased)

Reimbursement Restrictions:

1. CSU does not pay state of Ohio sales tax. You will not be reimbursed for the Ohio sales tax portion of a purchase. If you are purchasing items and plan to seek reimbursement, you must receive a Tax-Exempt form & bring it with you when making the purchase. Organizations may request a sales tax exemption form by completing a request in VikesConnect at: <https://csuohio.presence.io/form/student-organization-state-of-ohio-sales-tax-exemption>
2. Students cannot be reimbursed for payments made to companies or individuals for services. Services from companies or individuals should be paid directly from a CSU student organization agency account or approved budget from an allocating organization account. Example: DJ, Speaker, Photographer, Rental agreement etc. (See Payments for more info).
3. Students cannot be reimbursed for office supplies. All organization office supplies should be purchased directly through its CSU agency account or approved budget from an allocating organization account (not through reimbursement). All office supply purchases must be made with one of the three IUC office supply contracted vendors: Boone Enterprises, GBEX, or Integrated Business Supplies.
4. Students cannot be reimbursed for printing materials printed outside of the state of Ohio (Ex: VistaPrint, and many other online printing companies). All printing must be done by a vendor with a production facility in the state of Ohio per the [CSU printing policy](#).

RSO EVENT POLICIES

All organizations events, held on or off campus, as well as travel events, must be submitted through the event request process in VikesConnect. Events not submitted in the appropriate time frame may not be funded by an organization’s agency account or allocated funds. Additional information regarding events is also found in the [CSU Facilities Use Procedures document](#) provided by Conference Services.

RSOs have the privilege of using University facilities. Space is available on a first-come, first-served basis and must be requested by submitting an Event Request on the organization’s VikesConnect page. Once the event request is submitted and approved by the organization’s advisor and president, CCE and Conference Services collaborate with departments across campus

on behalf of student organizations to ensure the proper approval and services are available for event success. The event request form includes pertinent policies and fees associated with event requests. If an organization does not have funding to support a requested event, the request will not be approved. CCE staff members are available to assist RSOs plan and prepare for their events.

RSOs planning to request funding from Student Government Association (SGA) for event(s), it is strongly recommended to complete the [Event Budget Form](#) and receive SGA funding approval **BEFORE** submitting the event request.

In addition, use the [Event Planning Checklist](#) to ensure RSOs don't overlook the details for their event(s). If RSOs are planning to spend funds from their own organization's account, make sure that the group has enough funds in its agency account to cover all external and internal costs. If the group does not have enough funds in their agency account to cover anticipated costs, the Budget Officer will deny the request until a deposit is made to cover the full-anticipated cost of the event.

CSU Event Internal Department Costs

RSOs planning an event or need space on-campus are responsible for all internal department associated costs such as housekeeping, equipment fees, police/security, no show fees, etc. Use the information below to help plan your event.

Conference Services Department

- **SET-UP LABOR COSTS:** Except for events held in the Student Center, most room set-ups will incur a labor charge. RSOs will not be charged for labor if they choose the default set up for their event. If an RSO decides to have the space set up in a certain way, labor costs will be charged - see [Conference Services Room Setup Costs](#). Note that there are three tabs at the bottom of the sheet. Special set ups may require additional charges. Please contact Conference Services for other set-up fees at conferenceservices@csuohio.edu.
- **EQUIPMENT COSTS:** Currently, student organizations are not charged for equipment use in the Student Center. However, if you need equipment other than what is built into a facility located outside of the Student Center, your group will be charged. Current costs of equipment are found on the [Conference Services Equipment Cost List](#).

If any other type of equipment that Conference Services does not have is needed, RSOs will also be charged for the rental of those items. Conference Services will inform the organization of those costs prior to renting the equipment.

- **STAGE MANAGERS:** A stage manager is required in Main Classroom Auditorium if any AV equipment will be utilized. If so, then the rate is \$14/hr (with a four hour min) in addition to the cost of use of AV equipment.

For events in *Waetjen and Drinko Auditorium in the Music & Communications building*, a stage manager will always be assigned at \$14/hr (with the four hour min). If AV will be utilized in Waetjen or Drinko then an Audio Technician will also be assigned at the rate of \$50/hr (with a four hour min). However, paying for the Audio Technician entitles the organization access to any and all AV available in Waetjen and Drinko at no additional cost.

Facilities Department

- **HOUSEKEEPING COSTS:** Any event held after 3:00 p.m. during the week or any time on a Saturday or a Sunday will incur a \$33 per hour housekeeping charge.

Catering Department

- **FOOD:** Refer to the “Food Service for Events on Campus” section of this manual for restrictions and directions.

Security Department

- **SECURITY/POLICE COSTS:** Police presence may be required for your event. The university's police department will make the determination of the number of officers assigned. The minimum cost for security is \$55 per hour per officer for a minimum of 4 hours (minimum charge is \$220), even if your event is less than 4 hours. Therefore, if two officers are assigned, the minimum charge would be \$440.

Parking Department

- **PARKING COSTS:** Parking and Transportation Services has provided us with current pricing for one-time guest parking. Depending on the needs of the organization, the prices may vary from what is below:
 - Prospect, East, West, & Central Garages - \$8 per space
 - South Garage & White Lots - \$6 per space
 - Short term parking locations (lots 22, 21 & 66) – between \$10 and \$20 per space

If you have any further questions, please contact Parking & Transportation Services at 216687-2023 or email them at parking@csuohio.edu. After filling out the event form, make sure to contact parking to get passes. **Filling out the form will not notify them.**

CSU Event External Costs

Events can also involve external Costs such as payments to DJs, photographers, performers, supplies, decorations, food, etc. Depending on need, please refer to **Frequent Types of Purchases other than Food** or **Payment/Contracts** sections for more information.

On-Campus Space Availability

RSOs submitting event/space requests should check [Conference Service's events calendar](#) to ensure the space they wish to use is available on the day & time of the event.

Fronting Events

Fronting consists of eligible University department or student organizations reserving space for another individual or organization. Non-disclosure of the actual client to obtain use of facilities or discounted facility rates is not permitted. Professional or external organizations are not eligible for

University departmental or student organization facility rates. They are "Partnership" and will be assessed the appropriate "Partnership" facility rates. **RSOs caught fronting an external organization will be responsible for the full facility rate and subjected to the loss of reserving facilities for future events.** Fronting will be determined by Conference Services by considering the event details and the CSU affiliation of the attendees.

Event Classifications

Organization events are categorized into three classifications:

Class 1 Event: A Facility Request Form must be approved by Conference Services at least 45 business days before the event. Class 1 Events require mandatory attendance to an Events Committee Meetings.

- Evening and weekend events
- General public (non-CSU students/faculty/staff) in attendance
- Admission fee or ticket sales required for admission
- Alcohol present at event
- CSU Police required for event

- A food waiver request for the event
- Special requirements and/or services are needed for the event
- Contract agreements with outside vendors

Class 2 Event: A Facility Request Form must be approved by Conference Services at least 15 business days before the event.

- Events with set up or audio/visual requirements
- Auditorium requests for rehearsals
- Events requiring Campus Catering and Dining Services

Class 3 Event: A Facility Request Form must be approved by Arena & Conference Services a minimum of 5 business days prior to the event.

- Information tables
- Bake sale and fundraising tables
- Events requesting facilities requiring no set up or audio/visual services

Events Committee

The purpose of Events Committee is to coordinate, facilitate, and schedule Class 1 events on the CSU campus. Events Committee facilitates appropriate event planning by communicating with necessary partners on campus and advising student organizations regarding the University, city ordinances, and/or state statutes regulations and policies, as well as funding needs. Events Committee is not a regulatory or enforcement agency.

Event Cancellation and No-Show Policy

Changes to an already scheduled event or outright cancellation must be submitted via the [Change/Cancellation Form](#) to Conference Services within five (5) working days of the event. DO NOT SIMPLY CANCEL THE EVENT IN VIKESCONNECT. Conference Services will not be notified if you only cancel the event in VikesConnect. Once you have completed the form and given it to Conference Services, you can then cancel the event in VikesConnect.

Responsible parties will be held financially accountable for all charges that would have been incurred because of commitments made to conference services in terms of labor and equipment set up. Any organization or group that does not properly cancel an event and is a “no show” at the time of the event will be assessed a fine that will at minimum equal all direct costs associated

with labor and equipment set up. Any fines may be assessed depending on the venue originally scheduled.

Food For On Campus Consumption

To ensure that food sales or service does not conflict with existing university food contracts and meets health and safety regulations, CSU Dining Services is the exclusive catering provider for events held on campus. Catering and food service details can be found at CSU Dining’s website, <https://vikingfoodco.campusdish.com/Catering>. There are instructions included on the CSU dining website to request catering services other than CSU dining. All CSU Dining timelines must be followed for requests to be considered.

NOTE: RSO needing to increase catering orders from what was originally submitted must notify the Budget Officer immediately at studentorgfinance@csuohio.edu to ensure the organization has enough funds to cover the increased cost.

Food & Catering Ordering Instructions

1. Use the guide below to find out which vendors the group can use depending on how much the group is going to spend.

Total Cost	CSU Policy Highlights
Up to \$300	No restrictions
\$300 to \$749	CSU Catering service or Rascal House Pizza
\$750 and above	CSU Catering

2. Once the group determines which catering vendor they will use, they will need to obtain a quote from the vendor. To receive quotes from specific vendors and complete the payment transaction see instructions below:

CSU catering:

Step 1: Place your order on the catering website. (The CSU Catering menu and pricing is available at <https://vikingfoodco.campusdish.com/Catering>)

Step 2: Submit VikesConnect Expenditure Request (Payment) upload catering confirmation email with order details and total amount. After approved, the Budget Officer will let the Catering Department know the group has sufficient funds to proceed with the order.

Note: Menu items that are ordered from our Simple Takeaways and Student Org. selections are designed for pick up only. This policy is stated within the menu as selections are made. If someone would want items from these menus delivered, an additional 25% delivery fee is charged to cover labor etc.

Rascal House:

Step 1: Check out the [Rascal House menu](#) and fill out the [Rascal House order form](#)

Step 2: Submit VikesConnect Expenditure (Payment) Food – After approved the Budget Officer will submit the order through MagnusMart to receive a Purchase Order (PO#)

Step 3: Once the PO# is generated the Budget Officer gives the number to the group to call in the order and give to Rascal House.

Step 4: After order is received the group will need to email the final receipt to the Budget Officer to finalize payment.

NOTE: Ordering from Rascal House via Purchase Order takes about 7 business days. If you need the order day-of, contact the budget officer.

Off-campus catering vendors:

Step 1: Call vendor and ask their preferred payment method. See if they are willing to accept a purchase order (PO) by the university or if they prefer payment via credit card.

Step 2: Ask for a quote. You can tell them you will be submitting it for a purchase order from CSU.

Step 3: Submit VikesConnect Expenditure Request (Payment) Food – After approved the Budget Officer will submit the order through MagnusMart to receive a Purchase Order (PO#)

Step 4: Once the PO# is generated the Budget Officer gives the number to the group to call in the order and give to the vendor.

Step 5: After the order is received the group will need to submit the final receipt for the Budget Officer to finalize payment.

- *If the RSO is spending more than \$300 and cannot use CSU catering or Rascal House, the group will need to complete the [Catering waiver request form](#) and the Catering Department will need to review and sign prior to the event.*

Step 1: Call vendor and ask for the following: You can let them know that you will be submitting it for a purchase order from CSU.

- Quote
- Vendor W-9
- Proof of a Food Service Operations License issued by either the City of Cleveland or by the jurisdiction in which the business operates.
- Proof of a certificate of commercial general liability insurance in limits of not less than \$1 million dollars. CSU must be shown as an additional insured on this certificate.

Step 2: Fill out the [Catering Waiver Request Form](#). Take all the above documents to the Catering Department to see if they will approve the waiver.

Step 3: Submit VikesConnect Purchase Request (Payment) – including the Quote, W-9, and Catering Waiver. After approved the Budget Officer will submit the order through MagnusMart to receive a Purchase Order (PO#)

Step 4: Once the PO# is generated the Budget Officer gives the number to the group to call in the order and give to the vendor.

Step 5: After the order is received the group will need to submit the final receipt for the Budget Officer to finalize payment.

3. Groups seeking reimbursement for Food or Catering must also follow the Catering policies according to the amount spent. Follow the steps in the “Reimbursement” section of this manual.

Non-Alcohol Events

Events where alcohol is neither served nor sold may be open to CSU students, faculty, staff, and the public. Proper identification is required for all attendees. Events open to the public incur greater security requirements and costs.

Alcohol Events

Cleveland State University prohibits alcohol use inconsistent with state, local, or university regulations. CSU expects responsible behavior of all members of the community who choose to drink alcoholic beverages and requires an environment free of coercion for those who choose to abstain. Individuals must accept responsibility for their own behavior and should demonstrate a concern for the safety and wellbeing of others in the community.

Violators will be subject to university sanctions, which may include suspension/expulsion from the university and criminal penalties. This policy also applies to any location where university-related activities occur or when using university vehicles, or when using private vehicles on

university business. Individuals and/or student organizations violating this policy are subject to all relevant penalties. Please refer to the Student Code of Conduct for more information.

University community members are encouraged to seek assistance for students due to overconsumption of alcohol. While on campus, contact the Cleveland State University Police Department. While off campus, contact local emergency services. Upon the recommendation of the Cleveland State University Chief of Police or designee, the officers of the student organization involved, and/or University representatives, may withdraw permission for a social event that is believed to be a potential security hazard.

To serve alcoholic beverages at CSU-sponsored events, the following guidelines must be followed:

1. General Fee funding may not be used for purchase and/or reimbursement of alcohol.
2. Alcohol serving must always conform to state and local laws and university policies.
3. Both on and off campus events at which alcohol is served may be either private (open only to organization members and invited guests), or social (open only to CSU students, faculty, staff, and invited guests). Guests must present official invitations at the door or appear on a guest list prepared in advance.
4. Events using, or implying, the Cleveland State University name, utilizing the Cleveland State University accounting system, or events publicized are subject to all university policies and procedures.
5. At social events, alcohol must be sold; it cannot be given away. Alcohol may not be served at events open to the general public. Alcohol events incur greater security requirements and costs.
6. State liquor laws mandate that all liquor, including beer, may not be sold unless by permit. The definition of "sale" in the liquor laws is very broad and includes charging for the cup, glass, or set-up in which the alcoholic beverages are served, selling tickets that can be exchanged for an alcoholic beverage, or charging at the door for admission to the event.
7. If the event is to be a dinner dance or banquet at which alcohol is to be served, the ticket for the event must be sold to members in advance and must be for the cost of the meal, not the alcohol. The ticket must state that the charge is for the cost of the food only.
8. In special circumstances, organizations may apply for a temporary permit that allows for the sale of alcohol. All such requests must be directed to the Cleveland State University Chief of Police or designee via the Events Committee meeting.
9. Recognized Student Organizations must indicate on their event request that alcoholic beverages will be served or sold. They must also attend their allotted Events Committee meeting prior to the event.
10. Two members of the organization must abstain from drinking any alcohol 24 hours prior to the event, as well as during the event, and assume the responsibility for ensuring that alcohol

is not served to individuals who are under 21 years of age, and that alcohol is not served to anyone who is visibly intoxicated.

11. The organization must provide The Center for Campus Engagement a detailed risk management plan, including how the organization will ensure student safety during the event and make sure that alcohol will not be served to participants not of legal age.
12. The consumption of alcohol may not be the focus of an event.
13. Student organization advisors must approve and attend during the event where alcohol is served.
14. University marks may not be used in conjunction with the sale or promotion of alcoholic beverages.
15. Alcohol will not be served to persons who are, or who appear to be, intoxicated.

Identification and Security

- A third party provided by the sponsoring organization of an event where alcohol is served must check the identification of all persons seeking admittance to the event. Two acceptable forms of identification are (1) a valid driver's license and (2) a state of Ohio identification card issued by the Bureau of Motor Vehicles.
- The sponsoring organization is responsible for ensuring the venue is placing wristbands on persons who are eligible to purchase or consume alcoholic beverages as a method to identify those who are permitted to do so. The vendor is responsible for checking the wristband and to serve alcoholic beverages only to persons legally permitted to make a purchase.
- A sign indicating the minimum age for the purchase or consumption of alcoholic beverages must be posted at each point of sale and service.
- For all events where alcohol is sold, appropriate security personnel acceptable to the University Police must be present to help enforce these guidelines. The sponsoring organization is responsible for communicating this information during the Events Committee meeting before the event.
- Responsibilities of security personnel may include checking identification, monitoring the perimeter of the alcohol permit area, handling disturbances, and assisting at the points of sale or service, as necessary.

Publicity

- Advertising for events where alcohol is to be served shall not contain visual representations of such items as foaming mugs, beer cans, kegs, or other items promoting alcoholic beverages. Publicity may state the variety of refreshments available, with no single refreshment receiving undue emphasis.

- All publicity must state that a valid driver's license or state of Ohio photo identification is required to determine whether persons may purchase or consume alcoholic beverages.
- All advertising and publicity for both on- and off-campus events must conform to state and local laws and the policies of the university and include the name of the sponsoring organization. Publicity will not be approved for off-campus events that do not conform to university policy or that promote the unlimited consumption of alcohol. It is the responsibility of the sponsors of an event to ensure that advertising conforms to these guidelines.

Additional On-Campus Event Guidelines

- All alcohol sold and served on the campus shall be through the university's food service vendor(s).
- For all student organization events at which alcohol is sold, appropriate CSU Police Officers must be present. The sponsoring organization is responsible for all associated service fees. CCE, through the Event Request process and Events Committee, will assist all student organizations in contacting University Police for security arrangements.
- When alcohol is served, nonalcoholic beverages must also be available at no charge.
- Snacks must be available, at no charge, for any event where alcohol is served.
- Alcohol may not be carried onto or off the premises of a permit area.
- Sponsors must post hours of sale or service at all points of sale.
- Alcohol shall not be sold or served prior to 2 p.m.
- The sale of alcohol shall not last more than a total of three consecutive hours without at least a one hour suspension of sale.
- The sale of alcohol must cease 45 minutes prior to the end of the event.
- The sale of alcohol at outdoor events must be maintained in a distinct area, clearly separate from the general area.

Additional Off-Campus Event Guidelines

- All organization events must be registered through the events request from on VikesConnect.
- All student organizations planning to hold off-campus events at venues must meet with the Center for Campus Engagement (CCE) to review their event plans prior to their event. Additional time and obligations may be required for venues that serve alcohol (i.e., bars, restaurants, music venues, etc.).
- All off-campus events must be open to those students under the age of 21 when using organization funds.

- Organizations may not pay for or serve alcohol at these venues. The event venue is responsible for providing certified staff for checking IDs and serving alcohol to guests.
- Student organizations holding events off campus assume all financial and legal responsibility.
- Student organizations are subject to all state and local laws relative to the consumption of alcohol. The complete text of state liquor law and related regulations can be found in the Ohio Revised Code.

Off Campus Events At Venues Serving Alcohol

- All student organizations planning to hold off-campus events at venues that serve alcohol must meet with the Center for Campus Engagement (CCE) to review their plans prior to their event. Additional time and obligations may be required for venues that serve alcohol (i.e., bars, restaurants, music venues, etc.). All off-campus events must be open to those students under the age of 21 when using organization funds. Organizations may not pay for or serve alcohol at these venues. The event venue is responsible for providing certified staff for checking IDs and serving alcohol to guests.

Sanctions

The university will enforce all state and local laws relative to the consumption of alcohol. Individuals and/or student organizations violating this policy are subject to all relevant penalties including referral to the university Office of Judicial Affairs. Please refer to the Student Code of Conduct for more information.

Corporate Sponsorship

University marks may not be used with the sale or promotion of alcoholic beverages.

Safety Measures

University community members are encouraged to seek assistance for students due to overconsumption of alcohol. While on campus, contact the Cleveland State University Police Department. While off campus, contact local emergency services.

Upon the recommendation of the Cleveland State University Chief of Police or designee, the officers of the student organization involved, and/or the CCE Director, may withdraw permission for a social event that is believed to be a potential security hazard.

Other Event Information

Facilities Management

Groups needing electrical or water hook up, trash cans, clean up, or any other type of labor, must submit a Service Request Form:

<https://www.csuohio.edu/facilitiesmanagement/facilitiesmanagement-0>.

Service fees for events that occur after 2:00pm on weekdays, events which take place on weekends or when the University is closed, as well as events involving food will be applied to the RSO's agency account unless funding for facilities charges is awarded from one of the GFAC funding accounts.

Sound Policy

For classes, administrative functions, and programming events to co-exist, the University has adopted the following sound policy, intended to maximize campus life events with minimal disruption of the educational process.

Sound levels are to remain compliant with, and are not to exceed, occupational noise standards set forth by the Occupational Safety & Health Administration (OSHA) throughout the duration of the event. The University by and through the Department of Conference Services reserves the right to establish acceptable decibel levels for amplified sound events, and reserves the right to interrupt and, if necessary, terminate performances to remain compliant. Recognized CSU organizations planning an amplified sound event must consult with the Director of Conference Services or designees thirty (30) days prior to the event.

Outdoor events that include amplified sound must also be planned thirty (30) days in advance. Events with amplified sound are limited to one event per week during academic sessions (this considers all amplified events submitted to Conference Services). Exceptions may be granted by Conference Services during Welcome Week and Spring Fest.

Scheduling of amplified sound is limited to Tuesday and Thursday: 11:45am – 1:15pm and Friday after 1:30pm.

Risk Management

The Center for Campus Engagement partners with student organizations to provide events that enhance the student experience and support the educational mission of CSU. No matter how big an event or how small an activity, risk will be present at some level. Learning to manage risk will reduce liability and ensure a fun, safe environment for participants.

Student organization leaders, members, and advisors work with administrators, faculty, and staff to make intelligent, fair, and reasonable choices within the boundaries established by state, federal, and local laws, university rules, and the educational mission of the institution.

Insurance

Most student organization activities do not require the purchase of insurance. Cleveland State University provides liability coverage for most authorized events. However, higher risk activities or large-scale events may require the organization to purchase additional insurance. Recognized fraternities and sororities are required to submit proof of current organizational insurance to CCE annually.

Children/Minors at Events

Student organizations often invite to campus or engage with area youth. For each program where minors (under the age of 18) are present, CSU's policies related to minors on campus must be adhered to. Policies can be found on the Office of University Compliance website:

<https://www.csuohio.edu/compliance>.

Participation Waivers

Student organizations are required to have waivers available for participants to sign. Waivers are primarily used in two circumstances:

- If a student organization is traveling off-campus for an event or program that they have sponsored.
- If a student organization is sponsoring a physical activity (Powder Puff football, basketball, etc.)

If an event falls into one of these two categories, representatives from the organization must meet with a member of CCE to create a waiver specific to that event. The organization will obtain signatures for the waivers before the event and retain them for its duration. After the event, the waivers need to be uploaded to the organization's documents file in [VikesConnect](#).

A link to CSU's Assumption of the Risk, Release, and Waiver of Liability can be found here:

https://www.csuohio.edu/sites/default/files/ASSUMPTION_OF_THE_RISK_New_June_2016_rev.docx

RSO TRAVEL POLICIES

CSU's Center for Campus Engagement (CCE) Student Organization Travel Policy is a conduit of the University's Travel policy and is designed to ensure that University recognized student organizations (RSOs) and individual travelers adequately consider and plan for the safety issues associated with an event and/or activity involving travel. This policy reiterates guidelines for Cleveland State University sponsored travel involving student organizations.

If any of your organization members are planning to travel off campus read the Student Travel Instructions and complete all necessary steps found below. If you have questions, contact the Budget Officer in Student Life at studentorgfinance@csuohio.edu.

RSO Travel Definitions

- RSO member attendance to any event not held on CSU's campus as a representative of their respective organization and Cleveland State University. Examples of events include, but are not limited to:
 - Conferences/Conventions
 - Social trips
 - Travel to competitions for sports clubs
 - Service trips
- RSO member attendance to any event not held on CSU's campus where prepayment or reimbursement of expenses to members who travel are expected. Examples of expenses may be, but are not limited to:
 - Mileage/Vehicle Rental
 - Transportation (i.e., airfare, bus fare, etc.)
 - Housing Accommodations
 - Event fees

NOTE: Not all off-campus events are considered travel. Examples of non-travel, off-campus events could be things like holding a meeting at a local park, hosting a fundraiser car wash at a local church parking lot, volunteering as a group at a local nonprofit or visiting a local attraction like the Metroparks Zoo. These are off-campus events, but not travel as there are no overnight stays and distance is within 25 miles of campus.

Organization advisors are expected to serve as the primary point of contact for organization trips. If the advisor is unavailable to serve as the primary point of contact for organization trips, it is the organization's responsibility, together with their advisor, to find another CSU faculty/staff member to serve in that capacity. The primary point of contact for organization trips maintains contact with the organization as they travel, serves as liaison in the case of emergencies, and travels with the organization, if necessary.

Student Travel Procedures

Student organizations traveling off campus must complete and submit an Event Request in VikesConnect for travel. While students are traveling as a representative of the University, they must comply with the Cleveland State University's Travel Policy and Student Code of Conduct.

NOTE: RSO advisors, officers or members should NOT make their own travel arrangements. To ensure all required travel forms are completed, travelers MUST meet with the Budget Officer prior to leaving. The Budget Officer will make ALL travel arrangements.

FAILURE TO COMPLETE ALL NECESSARY TRAVEL FORMS PRIOR TO DEPARTURE MAY RESULT IN FORFEITURE OF REIMBURSEMENTS TO TRAVELERS, SUSPENSION OF ORGANIZATION TRAVEL IN THE FUTURE, OR DENIAL OF FUTURE FUNDING REQUESTS FOR TRAVEL FROM SGA or SBA.

INTERNATIONAL TRAVEL: You must contact the Center for International Services & Programs at (216) 6873910 to obtain permission BEFORE you request funding OR make any travel arrangements.

Step 1: Estimate Costs

- Conference or Event Registration Fees
- Lodging
- Meals (use [U.S. General Services Administration's Per Diem Rates](#)). Use the destination city per diem rates to estimate meal expenses.
- Reimbursement is for actual expenses with an itemized receipt. There is no reimbursement for alcohol.
- Transportation
- Airline -Ticket cost, baggage, or seat selection fees, etc.
- Car Rental - Enterprise must be used. The Superior Avenue location must be used for local car rentals.
- *Tolls*
- Taxi, Uber, Lyft

- Parking
- Gas - You cannot seek reimbursement for both gas and mileage, only one or the other. *Usually reimbursed with the use of a rental vehicle.*
- Mileage (per diem rates) - You cannot seek reimbursement for both gas and mileage, only one or the other. Mileage cannot be reimbursed with the use of a rental vehicle. Reimbursement for use of a privately owned automobile shall not exceed the round trip coach air fare of all persons traveling in the car or the mileage allowance, whichever is the lesser.
- Supplies
- Other

If your organization wishes to request Student Government Association, Student Bar Association or Viking Expedition funding to pay for your travel, make sure to submit a budget request for funding well in advance. Once a group has confirmation that their request has been approved or denied, they can budget for the trip accordingly.

Step 2: Submit Event Request for Travel - Due at least 45 days prior to travel departure. [Submit a Student Organization Travel Request](#) form in VikesConnect. The RSO advisor will need to approve the submission before CCE will process the request.

After a group has come up with a concrete plan for travel, they will need to submit the Event Request for Travel within VikesConnect. Once the request is submitted, it must be approved by the group's advisor. Then the group will be contacted by the Budget Officer to meet and review all necessary forms and review any additional information or purchase requests that will be needed for the trip.

Step 3: Schedule meeting with Budget Officer to complete all required travel forms prior to travel. To ensure all documentation is complete prior to travel, at least one organization representative (such as the organization's Treasurer) must meet with the Budget Officer to complete all necessary travel forms. All required forms must be completed and submitted to the Budget Officer BEFORE the planned trip. **Failure to do so may result in forfeiture of reimbursements to travelers, suspension of organization travel in the future, or denial of future funding requests for travel from SGA or SBA.**

Depending on the details of the trip, students who will be traveling will be asked to complete the following forms:

- Assumption of Risk/Liability Waiver
- Travel Authorization
- Travel Emergency Contact List
- Motor Vehicle Release Form (for all students who are identified as drivers).

Step 4: Submit Travel Purchase Request(s) for Payment - *Due at least four 45 days prior to travel departure.*

The most common payments made before a trip are for registration fees, airline tickets, hotels, and rental cars. See the section below “Travel Payment Guidelines” for more details.

Once the group’s purchase request(s) are submitted and approved by the group’s advisor, the Budget Officer will be able to process payment for the requests.

Step 5: Travel

Keep all receipts; reimbursement requests will not be processed without an itemized receipt, and in some cases a credit card receipt.

Step 6: Submit Purchase Request for Reimbursement (if applicable) - *Due no later than 15 days after returning from travel.*

Once the group’s advisor approves a request, the group will be contacted by the Budget Officer to complete a separate University required forms - the Travel Authorization and Expense Report and the Emergency Contact List.

Travel Payment Guidelines

Rental Cars

Registered student organizations traveling on behalf of the University for official organization business/events and are eligible to receive discounted rental vehicle rates.

Enterprise is the company that maintains a relationship with CSU. Enterprise – Address: 1802 Superior Ave., Cleveland, OH 44114. **For pricing call (216) 348-0700**

Here are the steps you will need to take to pay directly from your agency account or approved budget:

1. Email the budget officer with a request to make a reservation for you at studentorgfinance@csuohio.edu. You will need the following information:
 - # of vehicles needed
 - Type of vehicle (Example: Compact, Sedan, Minivan, etc..) ○ Enterprise location you will be using
 - Pick-up: Date and Time
 - Drop-off: Date and Time
 - At least one driver name who will be there to pick up vehicle(s) ○ Estimated total price
2. Budget Officer makes the reservation and sends group the confirmation(s).

3. The group submits a purchase request for payment within the group's finance Tool for approval, uploading the confirmation(s).
4. The Budget Officer submits the request into MagnusMart to generate PO#. Once generated, the PO# is given to the group.
5. At pick-up, the PO# is given to Enterprise
6. After the rental, an invoice will be sent to the Student Life Office to pay.

Please review the CSU Driving and Motor Vehicle Policy as well as information on what to do in the case of an emergency/accident: <https://www.csuohio.edu/ehs/automobile-damageshttps://www.csuohio.edu/ehs/automobile-damages-and-lossesandlosses>

Hotels & Airline tickets

For the Budget Officer to book hotels and airline tickets for RSOs using their group funds, they will need to provide specific information for each within the purchase request submitted in VikesConnect. *Due at least four (4) weeks prior to travel departure.*

Documentation needed for Hotel Payments:

- Name and address of the hotel
- Date and Time of Arrival
- Date and Time of Departure
- # of rooms
- # of occupants
- Name of a traveling member to attach to the reservation.

Documentation needed for Airline Ticket Payments:

Screen Shot of potential flight itinerary (Flights change frequently, so the flights submitted may not be the ones that group will be able to get). The screenshot must include:

- Name of Airline(s)
- Flight #s
- Date and Time of Departure from CLE
- Date and Time of Arrival to CLE
- # of members traveling, including their:
- Legal Names (As reads on the legal ID they will bring to the airport)
- Genders
- Date of Birth

Please contact the Budget Officer if you have any questions at studentorgfinance@csuohio.edu

Transportation Requirements Using a Vehicle

All RSO travel participants are required to follow the transportation requirements. Compliance with these items is required. These transportation requirements apply to travel by car or minivan but do not apply to travel by air or charter bus.

Driver Requirements

- All drivers must be at least 18 years of age and have a valid driver's license.
- All drivers must consent to a motor vehicle record check to verify the driver meets the accepted criteria to drive.
- Drivers must obey all traffic laws, including seat belt use. If failure to obey traffic laws results in a ticket, the driver is responsible for any fines, including parking tickets.

Rental Vehicles

Renting vehicles from university-approved rental car vendors is an accepted practice. Drivers must be at least twenty-one years of age. Enterprise is the company that maintains a relationship with CSU. Enterprise – Address: 1802 Superior Ave E, Cleveland, OH 44114. For pricing call (216) 3480700

Personal Vehicles

The use of personal vehicles is discouraged because the institution lacks control over the condition, maintenance, and insurance coverage on personal vehicles. Only licensed drivers who are at least eighteen years of age may drive a car or minivan.

CSU Van Rental Program

The Department of Parking and Transportation Services (PTS) has implemented a rental van program to service the CSU community. Departments, student organizations, and sports clubs will benefit from the convenience of working with PTS receiving personalized attention, responsive customer service and an on-campus pickup and drop-off location. More information can be found at: <https://www.csuohio.edu/rentalfleet>

Insurance

For rental or personal vehicles, please refer to Cleveland State University's Motor Vehicle policy posted on the Environmental Health and Safety website <https://www.csuohio.edu/ehs/automobile-damages-and-losses>.

Driving Requirements

- Travel routes must be planned in advance.
- Student organization leaders are encouraged to select drivers who have at least two years of licensed driving experience free of any court-imposed restrictions.
- Two drivers are required on trips greater than two hundred fifty miles one-way.
- On trips over two hundred fifty miles one-way, drivers must rotate every three hours and no one person may drive more than eight hours in a twenty-four-hour period.
- Drivers are responsible for knowing and following all motor vehicle laws and safety regulations for each state in which travel occurs.
- The use of a cell phone, including text messaging, is prohibited for drivers while driving. Handsfree sets are also prohibited for drivers while driving.
- The number of passengers may not exceed the number of available seat belts. All passengers are required to wear a seatbelt at all times.
- Passengers may not engage in any behavior that would distract the driver.
- Transporting minors unless accompanied by a parent or guardian is prohibited.
- If drivers are participating in events and driving on the same day, then they should rotate more frequently to avoid fatigue.
- Driver fatigue is greater between the hours of midnight and six a.m. Drivers must use extreme caution when operating a vehicle during this time. A second person should remain awake and ride in the front passenger seat.

Inclement Weather

- When planning the travel route, check the forecast to see if inclement weather is predicted.
- During inclement weather, travel safety should follow guidelines set forth by the National Weather Service. Drivers should contact local law enforcement to determine the best course of action based on driving conditions.
- During inclement weather, drivers are to use extreme caution.
- When driving in treacherous weather and conditions are deemed dangerous or unsafe, immediately cease all travel and find the nearest shelter or hotel.
- The university will do its best to defray the cost of an overnight stay if bad weather impedes the safe return to campus. Permission to seek extended stays due to weather conditions is initiated through contact with the organization's advisor.

Behavioral Expectations

- All participants defined as Cleveland State University students are accountable to the CSU Code of Student Conduct throughout the trip.

- Being under the influence, or in possession of alcohol or drugs in conjunction with the trip and throughout its duration, is prohibited regardless of the age of the student participant, unless otherwise approved, regardless of the local drinking age. This applies from the moment of departure from campus until the return, or when the student participant disaffiliates from the approved travel arrangements.
- If the driver becomes aware of alcohol and/or drug consumption and/or possession, the driver should stop the vehicle and request that these substances be removed from the vehicle before the trip is continued. Failure of any passenger(s) to comply will cause immediate cancellation of the trip. Individuals as well as the student organization will be held accountable to the policies set forth in the CSU Code of Student Conduct.
- Smoking is prohibited inside any university-owned or rented vehicle.
- The transport of hitchhikers or any unauthorized passengers is prohibited.
- Use of other than a compact-size trailer is prohibited without approval.
- Students are encouraged to report reckless or irresponsible driving by other student participants so that appropriate safety measures can be taken for future trips.
- Driving in a foreign country poses extraordinary risks that may necessitate the purchase of special insurance. It is important to consult with the Center for Campus Engagement prior to traveling in a vehicle that crosses the border into another country outside the United States.
- All trip participants are ambassadors of Cleveland State University and as such must represent the university in a positive light. Alleged violations of the CSU Code of Student Conduct will be referred to the Office of Student Advocacy for investigation and resolution. CSU students and the sponsoring organization are responsible for the behavior of non-CSU students participating in the trip.

It is of utmost importance student organizations planning to travel off-campus inform CCE **at least 45 days** in advance of their trip. CCE must ensure all forms and documentation is correct and completed before students travel. **Failure to follow these instructions or have the proper forms completed prior to travel may result in forfeiture of reimbursements to travelers, suspension of organization travel in the future, or denial of future funding requests for travel from SGA/SBA/Viking Expeditions.**

FUNDRAISING ACTIVITIES

Student organizations are encouraged to engage in fundraising activities to support their organizational objectives. Student organizations planning to engage in fundraising activities (other than membership dues) should have the plans cleared with the Center for Campus Engagement before any purchases or fundraising activity. All funds raised by the organization must be deposited within one business day into the organization's agency account. Fundraising activities by CSU

organizations are not permitted if the funds are designed solely to enrich an individual or commercial partner.

RSOs are not to use third party collection apps or sites (i.e. Go Fund Me, Venmo, PayPal, Square, EventBrite, etc.) to collect credit/debit card payments. Organizations must use ShopNet to collect those types of payments. Instructions on setting up a ShopNet account is found in this manual.

Active recognized student organizations may raise funds on campus and in CSU buildings by selling literature or items owned by, or consigned to, the organization in accordance with the Center for Campus Engagement regulations.

The information below was compiled and provided by the Charitable Law Section of the Ohio Attorney General's Office. The information provided here is general in nature and may not apply to your organization's circumstances. This general information should not be considered a substitute for independent legal advice by an attorney of your choosing. For further information about the regulation of charities and charitable gaming in Ohio, please see the website of the Ohio Attorney General at www.OhioAttorneyGeneral.gov.

Most student organizations are not tax-exempt, and so are not considered qualifying charitable organizations, unless the organization has applied for that status with the Internal Revenue Service

Games Of Chance By Student Organizations

To understand whether your student organization is eligible to conduct games of chance, you must first understand what a game of chance is. As defined by the R.C. §2915.01(D), a game of chance is “poker, craps, roulette, or other game in which a player gives anything of value in the hope of gain, the outcome of which is determined largely by chance, but does not include bingo.” If your organization is playing one of these games for amusement only and there is no cost or wager to participate, then it is not a game of chance. If your organization is holding an event where there is a cover charge or fee to participate and it includes one of these games, but there is no opportunity to win or gain anything of value, then it is not a game of chance.

If your organization intends to conduct a game of chance that meets the definition above, it is important to understand if it is legally eligible. The conduct of games of chance for profit is statutorily limited to *qualifying charitable organizations* under the restrictions set forth by statute in R.C. §2915.02(D). To conduct games of chance in compliance with Ohio law, all the following rules must be observed:

1. The games of chance may be conducted **only by a charitable organization that is, and has received from the Internal Revenue Service a determination letter that is currently in effect stating that the organization is, exempt from federal income taxation under subsection 501(a) and described in subsection 501(c)(3) of the Internal Revenue Code**
2. The games of chance may not include craps for money or roulette for money
3. The games of chance are conducted at festivals of the qualifying charitable organization
4. The games of chance are conducted by the qualifying charitable organization for not more than a total of five days in a calendar year
5. The games of chance are conducted by the qualifying charitable organization on premises that are either:
 - a. Owned by the charitable organization conducting the games of chance for at least one year immediately preceding the conduct of the games of chance
 - b. Leased from a governmental unit
 - c. Leased from a veteran's or fraternal organization for a rental rate not to exceed the lesser of 45% of the gross receipts of the games of chance or \$600 per day of the festival, provided that the premises have been owned by the veteran's or fraternal organization for at least one year immediately preceding the conduct of the games of chance and have not already been leased by the veteran's or fraternal organization twelve times during the preceding year for the conduct of games of chance
6. The only expense that may be deducted from the money or assets received from the games of chance are the prizes paid out during the conduct of the games of chance. All of the remaining funds must be used by, or given, donated or otherwise transferred to an organization that is described in subsection 509(a)(1), 509(a)(2), or 509(a)(3) of the Internal Revenue Code and is either a governmental unit or an organization that is tax exempt under subsection 501(a) and described in subsection 501(c)(3) of the Internal Revenue Code.
7. The games of chance are not conducted during, or within ten hours of, a bingo game conducted for amusement purposes only.
8. No person receives any commission, wage, salary, reward, tip, donation, gratuity, or other form of compensation, directly or indirectly, for operating or assisting in the operation of any game of chance.
9. The qualifying charitable organization maintains all records regarding the games of chance required by R.C. §2915.10, as follows:
 - a. An itemized list of the gross receipts of each game of chance

- b. A list of all prizes awarded during each game of chance conducted by the charitable organization, and the name, address, and social security number of all persons who are winners of prizes of six hundred dollars or more in value
- c. An itemized list of the recipients of the net profit of the game of chance, including the name and address of each recipient to whom the money is distributed, and if the organization uses the money or assets received from the game of chance for any charitable or other purpose set forth in division (D) of section 2915.02, a list of each purpose and an itemized list of each expenditure for each purpose
- d. The number of persons who participate in any game of chance that is conducted by the charitable organization
- e. The charitable organization shall maintain these records for a period of three years from the date on which the game of chance is conducted, and shall keep the records at its principal place of business in this state or at its headquarters in this state and shall notify the Attorney General of the location at which those records are kept.

Raffles/ Drawings by Student Organizations

Raffles are very succinctly defined under Ohio law, which states:

"Raffle" means a form of bingo in which the one or more prizes are won by one or more persons who have purchased a raffle ticket. The one or more winners of the raffle are determined by drawing a ticket stub or other detachable section from a receptacle containing ticket stubs or detachable sections corresponding to all tickets sold for the raffle. "Raffle" does not include the drawing of a ticket stub or other detachable section of a ticket purchased to attend a professional sporting event if both of the following apply:

The ticket stub or other detachable section is used to select the winner of a free prize given away at the professional sporting event; and

The cost of the ticket is the same as the cost of a ticket to the professional sporting event on days when no free prize is given away.

R.C. §2915.02(CC)

When meeting this definition, raffles are recognized as a legal form of fundraising for certain charitable organizations in Ohio. According to R.C. §2915.092, charitable organizations that are exempt from federal taxation under subsection 501(a) and described in subsection 501(c)(3) of the Internal Revenue Code "may conduct a raffle to raise money" and they are not required to secure a bingo license to do so. Therefore, if your organization has been granted 501(c)(3) tax exempt status by the IRS, you may legally conduct raffles as a fundraiser.*

Drawings or door prize giveaways that do not require the participant to purchase or give anything of value for a chance to participate are not raffles.

** In addition to 501(c)(3) organizations, public schools, chartered nonpublic schools, community schools, veteran's organizations, fraternal organizations, or sporting organizations that are exempt from federal income taxation under subsection 501(a) and described in 501(c)(4), 501(c)(7), 501(c)(8), 501(c)(10), or 501(c)(19) of the Internal Revenue Code may conduct raffles. However, these organizations are required to distribute at least fifty percent of the net profit from the raffle to a charitable purpose, federal or state government, or to a political subdivision. See R.C. §2915.092 for additional information. Drawings or door prize giveaways that do not require the participant to purchase or give anything of value for a chance to participate are not raffles.*

Bake Sales

A member from the organization must be designated to monitor all aspect of food handling in compliance with Food & Drug Administration (FDA) food safety recommendations. This includes time & temperature requirements for safe food handling and ensuring that perishable foods are disposed of following the event. Complete information about the FDA Safe Food Handling Codes may be downloaded at www.fsis.usda.gov/pdf/cooking_for_groups. Additionally, University organizations may sell or distribute food only if they do so in conformity with the following procedures:

1. Food Sales – Bake Sales

- a. Food prepared by a University organization for bake sale fundraising activities may be sold when the space has been properly reserved through Conference Services.
- b. All food must be individually wrapped, enclosed beneath plastic, or otherwise be protected from unnecessary handling or other airborne contaminations.
- c. The University organization selling and distributing is responsible for normal cleaning of the sales site at the completion of the sales event.

2. Donations

- a. All donated food must be processed or prepared in a licensed food service operation, or in an establishment or place, meeting equivalent requirements of the Ohio Department of Health. A letter of donation from the licensed food operator to the Director of Dining Services must be provided ten working days before the event.
- b. When the Director of Dining Services has approved a Catering Services Waiver Request form, and food will be sold or distributed, a Temporary Food Permit is required. A Temporary Food Permit may be obtained by applying to the City of Cleveland's Division of Licenses an

Assessments a minimum of one week prior to the event, with the appropriate application/process fee at:

Cleveland City Hall
601 Lakeside Avenue Room
122
Cleveland, Ohio 44114
Attn: Division of Licenses and Assessments

- c. A representative of the Health Department will be on site to ensure all Health Department guidelines are being followed. They will give approval for the food service to begin. A valid temporary food service license must be presented to Conference Services and Dining Services prior to the scheduled food event. If there is not a valid license presented, the event will be cancelled.

Commercial Sales

No commercial sales, profit making, direct sales events, merchandise for book signings, credit cards, or banks/financial institutions are permitted on University property, except through approved vendors currently under contact with CSU. University organizations cannot function as on-campus agents or representative for commercial firms, enterprises, or banks/financial institutions.

PUBLICITY AND POSTING

RSOs wishing to post marketing materials must follow the posting procedures guidelines found here: <https://www.csuohio.edu/conference-services/posting-procedure-guidelines>.

Departmentally controlled and special-use bulletin boards are not included under this policy. Any material not fulfilling these requirements will be removed by University personnel.

Effective advertisements include the following information:

- description of event/activity/service
- identification of the sponsoring organization or department
- whether there is any charge for the event
- the date/time/location of the event
- reason for the event/activity/service
- email address of person or organization

Chalking is not permitted.

<https://www.csuohio.edu/sites/default/files/ExpressiveActivityProceduresforposting.pdf>.

It is not permissible to tape, tack, or glue flyers on any glass surface, door, wall, banister, etc. RSOs that do not follow the posting procedures guidelines will be responsible for incurred costs if additional labor is required for removal of postings, will lose posting privileges for improperly posted materials, and may be suspended.

The University reserves the right to regulate the time, place, and manner of posting and distribution of printed material. The University is not responsible for the content of printed material being posted or distributed. No advertising for an event is allowed until an event has been properly approved and scheduled.

The name of the organization sponsoring the event must be clearly visible. The date of the event being advertised or a date at which the poster is considered to have fulfilled its function must be included.

To maintain the natural beauty of the campus and to preserve the quality of the buildings, trees, and shrubs, there shall be no posting of notices on any trees, buildings, utility poles, or campus sidewalks. Posting is not permitted on woodwork, doors, windows, walls, or bulletin board frames.

Courtesy and respect for the freedom of expression by others dictates that posters are not to be marked on, destroyed or removed. Anyone discovered defacing posters will be subject to disciplinary action.

Advertisements may not be distributed in any faculty or staff work area; on vehicles; inside classrooms, laboratories, libraries, or offices; and door-to-door or in corridors adjacent to student rooms in residence halls.

When submitting event requests, RSOs are encouraged to make events open to the CSU community. Events open to the CSU community will appear on the VikesConnect calendar, which is can be seen by all students.

Student Center Digital Displays

Student organizations wishing to advertise events on the digital displays located throughout the Student Center must complete a request form in VikesConnect at:

<https://csuohio.presence.io/form/digital-signage-request-form-student-center-video-screens> at least four weeks in advance if it is for an event. Event advertisement requests must meet the

following guidelines:

- The organization must be an approved RSO with the Center for Campus Engagement (CCE). • The event must be open to all CSU students and have been approved and scheduled by Conference Services.
- CSU course announcements or encouragement to register for courses will not be posted unless approved by university administration.
- Due to the heavy volume of requests, announcements for normal organization meetings will not be posted.
- Your message cannot contain references to alcohol or drugs (unless it is an anti-drinking/drug use event), nudity/indecency or otherwise obscene content, negative portrayal of CSU, or any other content deemed offensive or controversial by the university or CCE.
- Events in places where alcohol is consumed or events promoting or otherwise including alcohol will not be scheduled. The only exception is events held in authorized on-campus restaurants serving alcohol.
- The event must be held AT LEAST four weeks after this submission and no more than six (6) weeks in advance of the event. CCE will make the final determination how long the sign will run in rotation on the screens.
- The graphic must be submitted as a graphic image (.jpeg, .gif, .tif, .png, etc.). No MS Word documents, MS Powerpoint, MS Publisher, or Adobe PDF files will be accepted.
- The sign must be 768 pixels wide by 1024 pixels tall at a minimum of 150 dpi (dots per inch). For the screen on the 3rd floor of the Student Center, the dimensions are 1024 pixels wide by 1280 pixels tall.
- Any submission not meeting the requirements will be sent back to the submitter.
- Please name your graphics file the same as your event. Do not name the file anything generic like event.jpeg or visix.gif
- CCE will communicate with the event submitter to finalize marketing materials. Failure to communicate in a timely manner may result in marketing not being shared/released.
- All advertisements must include the following information:
 - a) description of event/activity/service
 - b) identification of the sponsoring organization or department
 - c) whether there is any charge for the event
 - d) the date/time/location of the event
 - e) reason for the event/activity/service
 - f) email address of person or organization

Student Organization Banners

Recognized student organizations may request to hang their organization banner in the Student Center. Banner designs must be approved by CCE and must meet Conference Services dimensions, 6'x4'. Banners must be provided by student organizations. Requests will be considered first come, first served, and displayed for the academic year. Banners which are not properly approved, out of date, oversized, hung in wrong areas, or belong to an organization that is not recognized will be removed.

Banner postings outside of the Student Center are not covered by this policy; anyone interested in posting elsewhere are required to secure approval from the appropriate College Dean or building administrator, or the Campus Beautification Committee for exterior banner displays.

RSOs wishing to be considered for banner placement can contact the Center for Campus Engagement at studentorgs@csuohio.edu. Space is limited, therefore there are no guarantees the banner will be hung.

Viking Newsletter

The Viking Newsletter is designed to promote student organization events, activities, and news. Student Organization events take priority in the newsletter. If room allows, CCE will include submissions from university departments/programs on a case-by-case basis.

Submission Guidelines

- RSO events must be open to all students and approved and scheduled by Conference Services.
- RSO events must include date, location, time, description and contact information for questions.
- RSO events where alcohol is present will not be included.
- General RSO meetings or calls for recruiting new members will not be included.
- Only RSO officers may submit content for consideration. Submissions from any other organization member, including advisor, will not be considered.
- "Emerging Organizations" submissions will not be accepted unless it is for announcing a recruitment tabling event in the Inner Link. Only fully registered organizations may submit content for consideration.
- CCE reserves the right to edit submissions.
- Submission requests do not guarantee inclusion in the newsletter.
- Submission deadline is Thursday at 9am for inclusion in the next Monday newsletter.

RSO Social Media Guidelines

"Social media" is a category of online media that supports people talking, participating, sharing, networking, and bookmarking online. Common social media platforms include, but are not limited to, online social networks such as Twitter, LinkedIn, or Facebook; blogs, podcasts, discussion forums, RSS feeds, and content sharing sites such as Instagram and YouTube. Cleveland State University student organizations who have social media accounts are expected to adhere to the university's Social Media Guidelines

(https://www.csuohio.edu/sites/default/files/CSU_Social_Media_Guidelines_2015.pdf) in addition to the points outlined below:

- Student organizations are strongly encouraged to have their faculty advisor as an administrator on their social media page. If club leaders change or graduate, the club advisor can still grant access to new club officers and members.
- Every effort should be made to share login information and administrator privileges from one organization president to the next so that new pages do not have to be created each academic year. This reduces confusion among organization members as to which organization page is the "official" or "correct."
- Post contact information for the student organization when possible. If your page is used to recruit new members, students should know how to get in touch with the organization. Organizations are strongly encouraged to provide a link to their page in VikesConnect.
- Student organization social media accounts are considered "unofficial" and should not use the Cleveland State University logo. These sites are also encouraged to post a statement in their profile they are not an officially recognized CSU social media page and all postings reflect their own personal opinions or their organization's opinions. An example of this statement is provided below:

"The views expressed on this (Facebook page, Twitter feed, etc.) are those of the (Insert Organization Name) and are not endorsed by Cleveland State University nor do they constitute any official communication from Cleveland State University."

The Center for Campus Engagement manages its own social media accounts and will share RSO social media posts as deemed appropriate. Requests by organizations for CCE to share their social media posts will be made by CCE administrators on a case-by-case basis.

Student Media Policy

1. Policy Premises - All Cleveland State University's student - edited media are recognized as designated public forums. Student editors have the authority to make all content

decisions which are free from administrative, faculty, or student censorship, and advance approval of content. This designation is essential to the pursuit of truth, development of independent thought, and discussion of campus, state, national, and international issues of concern to the University community. Student media at Cleveland State University enjoy the same freedoms accorded all professional media in the United States. As recognized student organizations, CSU student media must comply with all University policies and regulations governing student organizations. The rules, regulations, and policies of

Cleveland State University, in conjunction with those of the Federal Communications Commission, shall hold precedence over all rules, regulations, and policies applying to this organization, including those of any other national associations with which WCSB 89.3 FM is affiliated.

2. Responsibilities of the Editor/General Manager

- a. The Editor-in-Chief (EIC) or General Manager (GM), in consultation with his/her staff, shall be responsible for all aspects of administrative leadership of the organization as well as printed or broadcast material communicated.
- b. The EIC/GM is responsible, consistent with the fiscal guidelines of the University, for ensuring financial solvency of the organization.
- c. The EIC/GM is responsible for selecting and dismissing staff and determining the positions needed to best accomplish the organization's mission.
- d. The EIC/GM shall be responsible for ensuring that openings for staff positions are available and accessible to all eligible students who wish to apply.

3. Fiscal Management

- a. Each student media organization is responsible for its own financial well-being, and the EIC/GM is responsible for the fiscal solvency of the organization. These organizations shall receive funding allocations from the University, and may also either (1) raise money via donations, or (2) sell services (such as advertising) to generate income.
- b. WCSB Radio, which maintains a development account, may retain in that account any funds left at year-end, and may roll these funds over into the next fiscal year (as is the policy with all development accounts). WCSB's General Fee account shall be maintained in accordance with other University General Fee accounts. The other media, which have income targets in their General Fee accounts, may have a positive balance at the end of the fiscal year, either through savings in their budget or from income received more than their target. At the end of the fiscal year, any

income received more than the income targets shall be deposited into a reserve account, i.e., the Student Media Reserve Account, administered by the Vice President of Student Affairs, or designee, and the Student Media Specialist in the Department of Student Life. Funds may be requested from this account for purchases that benefit more than one student media organization or to improve operation of any single student media organization. These excess funds shall not be swept at year-end.

APPENDIX: STUDENT ORGANIZATION TRANSITION PLAN

Officer transition training is the key to your organization's success from term to term and year to year. It is the outgoing and incoming officers' responsibility to ensure this transition occurs before they depart. The most successful transition plans include at least one month of overlap so new officers can shadow and learn from the outgoing officers.

Set up a meeting or retreat with the incoming officers, outgoing officers, and your advisor to hand off the following information and plan for the new officers' upcoming term. It is the outgoing officers' responsibility to prepare the transition information and documents for the incoming officers. The advisor is there to offer support, guidance, and direction, but is not responsible for the collection, maintenance, and distribution of materials.

At this retreat or meeting, topics to cover include:

- Teambuilding and ice-breaker activities to help the new officers get to know one another.
- Exchange contact information with each other and the outgoing officers.
- Introduce incoming officers to your organization's advisor.
- Goal setting
- Direction of the organization
- Idea brainstorming

- Share annual procedures and/or calendar of annual events, including recruitment events/activities.

Event planning, including a calendar of the upcoming year

Take out a calendar of this school year and review it together. What were the busy times? What kinds of things should the new officer anticipate? You may not remember everything you did, but looking at your calendar may jog your memory and help you pass on some tips.

Review past and future organization events

- Which events were successful this year? Which should be continued?
- When should the planning start?
- Which events didn't go well? Should they be revamped and tried again or just dropped?
- Were there any pitfalls or things that could have been improved?

VikesConnect Use

- Update your organization's roster on VikesConnect and show incoming officers how to access it.
- Show incoming officers how to access prior meeting agendas, minutes, financial records, media/marketing information, and any historical records for the organization. *Access to files are very helpful if the outgoing officer graduates or moves on to a different role on campus. Keep documents and passwords updated in a central location that officers can access or have files specific to each officer. Keep your organization advisor in the communication loop, too! They'll be a steady resource when your organization transitions leaders IF you let them know what's going on.*

Share files and passwords related to your officer positions and organization.

Types of files to share include the organization's operation manual, copies of previous contracts/agreements, evaluation forms, past budgets, etc.

Review and update your organization's constitution, if needed. Show incoming officers where to find your organization's constitution on VikesConnect. Contact CCE to review, approve, and upload your updated constitution to your VikesConnect page. CCE will not acknowledge constitutions that have not been approved.

Your constitution should contain:

- Mission, philosophy, goals, and purpose of organization
- Position description of officers and members
- List of committees and their description

Recruitment activities

- What recruitment activities were done? What worked? What didn't work?
- Why did new members stick around? If they didn't – what made them leave? *A great way to recruit new members is at the Organization Fair in the beginning of each semester. An VikesConnect message with the registration form will be sent to all organization officers prior to the beginning of the semester.*

Review budgets and funding.

- As part of the renewal process, incoming officers and advisors must complete a new Agency Account Form.
- What is the financial status of the organization?
- Where did the organization get money from this year?
- Show incoming officer how to request SGA funding, including the one-time, no questions asked, \$150 allocation
- Which fundraisers worked? Which didn't?

Next Steps: Create a "To Do" List

Work together to make a list of "things to do" for the incoming officer. Which items need their attention now? Make this list together so the outgoing officer can help with direction. Be sure to trade contact information so that the outgoing officer can be a resource in the year ahead.

Submit event requests to reserve space for upcoming events and meetings

- Where were meetings held? What worked? What didn't?

Create a summer contact list for the organization.

Ensure new officers know they must renew the organization through The Center for Campus Engagement (CCE).

- CCE communicates organization renewal information and timelines to current student organization leadership during the Spring semester. Current leadership is responsible completing the Transition Process.

- Incoming officers and advisors must attend training to maintain their status as a Recognized Student Organization (RSO).

Ensure new officers understand that to maintain RSO status, their organization must always meet the following requirements:

- Four individual students maintain eligibility to hold officer positions (president, vice president, treasurer, and secretary). Every student must have a cumulative GPA of 2.0 or higher and have earned a 2.0 in their last term of courses, and all student officers must be enrolled in at least 6 credit hours per semester during their term in office. One student may not hold multiple positions.
- A CSU faculty or staff member, full or part time, commit to the adviser role. Graduate assistants, teaching assistants, etc. may not act as your primary adviser.
- Maintain your organization constitution. Updates must be approved through the CCE office.
- The incoming president, treasurer, and advisor must complete an agency account form for your organization.