



REGISTRATION

First Name

Last Name

CSU Email

CSU ID #

Organization Information

Student Organization Name (no abbreviations)

Preferred Email for RSO Communication

This Organization is: New Existing

Additional Organizations

I am the financial officer of more than one student organization Yes No

#2 Student Organization Name (no abbreviations)

Preferred Email for RSO Communication

This Organization is: New Existing

#3 Student Organization Name (no abbreviations)

Preferred Email for RSO Communication

This Organization is: New Existing

#4 Student Organization Name (no abbreviations)

Preferred Email for RSO Communication

This Organization is: New Existing

Please email this completed quiz to slice_studentorgs@colostate.edu for scoring. If the score is 80 percent or above, we will record the score and email you a confirmation. If the score is below 80 percent, we will email you encouraging you to retake the quiz. Please allow 2-3 business days for review after you have submitted the quiz.



Welcome and Congratulations.

Congratulations on becoming the financial officer of your registered student organization, or RSO! Financial officers are essential members of RSOs and there's a lot you'll need to learn. After completing this orientation you will be more knowledgeable and confident in leading your org to a successful year ahead.

At the end of this module, there will be a brief 14 question quiz to test your understanding.

TRANSITION TOOLKIT

As you settle into this position, we hope you and the outgoing officer were able to review and discuss your transition.

- A transition meeting can help answer a lot of questions such as:
- When should you register your student org with the SLiCE office?
- What is the process?
- What were some of the successes of the organization last year?
- What were some challenges?
- If your RSO has a social media account, what is the login information?
- Where are the org's electronic files?

Transition meetings can also help you reflect on:

- Things you wish you knew and goals you hope to accomplish.
- Meeting conversations may include:
 - Sharing knowledge
 - Goals for the upcoming year
 - Transferring information
 - Reflections from the previous president
 - Identifying next steps for the incoming president
 - Making checklists

There are a lot of great resources in the Transition Toolkit to help guide a transition meeting between officers. Visit rso.colostate.edu to check it out. You won't regret it!

MINIMUM STANDARDS

Student organizations must meet the following minimum standards for recognition:

- Have a minimum of 3 CSU student members.
- At least 51% of the members must be CSU students.
- They must have a minimum of 2 officers. The same person cannot be the president and the financial officer. Officers must be fee-paying CSU students and maintain a minimum cumulative GPA of 2.25.
- Student orgs must have an advisor who is either a CSU faculty, Administrative Professional, State Classified employee, or graduate student.
- RSOs must comply with all University policies and regulations pertaining to student organizations and must be in "good standing" as seen through the Student Resolution Center.
- Student orgs must have a clearly stated lawful purpose, which must be included in its constitution. RSO's cannot be for-profit businesses.



RSO CATEGORIES

CSU is home to more than 400 registered student organizations. During the annual registration process, officers must select the ONE category that best represents their membership. You may feel like your RSO can be represented in many categories. Try to choose a category that best aligns with your mission, vision, and values. Categories include the following:

Category	Description
Academic (Pre-Professional)	Centers within an academic college, department, or program; provides an opportunity to explore major(s) in a more pre-professional context
Competitive Sports Club	Recognized and approved by Campus Recreation, these clubs involve regularly-scheduled competition in a sport with regional or national affiliation and a schedule of league play
Diversity/International	Promotes either a diverse perspective and/or a specific culture and gathers to provide support for involved students
Fraternity or Sorority	Fosters scholarship, leadership, service, and social development. Must be affiliated with the Panhellenic Association, Interfraternity Council, National Pan-Hellenic Council, or Multicultural Greek Council. Must be recognized by Office of Fraternity and Sorority Life.
Honorary	Recognizes outstanding academic achievement and/or outstanding leadership
Political	Supports or opposes any political party; a ballot measure or a drive to put an issue on the ballot; or a candidate or group of candidates formally running in an election for county, state, local, national, and/or campus office
Programming/Service	Provides learning opportunities to the campus community through a wide array of programs addressing specific topics, issues, and concerns
Religious/Spiritual	Involves worship, devotion, prayer, meditation, or study of religious concepts; or requires membership affiliation or shared beliefs with a group generally recognized as a religion, or to further or oppose a religious ideology
Representative	Involves governing, overseeing, coordinating, and/or representing other entities, student groups, and/or individuals
Social/Recreational	Promotes social interactions and/or offers recreational athletic fun
Sustainability	Aims to advance sustainable practices including economic, ethical principles, and cultural benefits attained through environmental responsibility



HOW TO REGISTER A STUDENT ORGANIZATION

New student organizations

- Step 1 – New student organizations are encouraged to meet with a member of the RSO Team. An RSO coordinator can help connect you with an eligible advisor, discuss recruitment strategies, and explain the registration process.
- Step 2 – All student orgs must have a constitution. This is a guiding document that can help provide clarity and consistency. You can outline the requirement for officers and election processes in the constitution.
- Step 3 – Have a list of student-elected officers. The president and financial officer must complete an online orientation module and pass the quiz with a score 80 percent or better.
- Step 4 – Prepare to answer questions and share your student org's plan for risk mitigation. To maintain your status as a student organization, Risk Management Protocol is mandatory for all registered student organizations.
- Step 5 – Finalize the registration process by Registering your RSO on RamLink by signing in with your eID and password and selecting 'Organizations'. Click 'Register an Organization' then select the blue 'Register a New Organization' button. If a gray 'Not Available' is displayed then the registration period is closed.
- If you need help with the registration process contact the RSO team at the SLiCE office.

Existing Student Organizations

- Step 1 – Existing RSOs should update their membership materials annually. This includes reviewing your organization's constitution, mission, meeting times, financial obligations, and membership roster. The roster must have at least 3 CSU student members along with their CSU e-mail address. Remove any members no longer affiliated or active with the org, and update your advisor's contact information.
- Step 2 – Have a list of student-elected officers. The president and financial officer must complete an online orientation module and pass the quiz with a score of 80 percent or better.
- Step 3 – Prepare to answer questions and share your student org's plan for risk mitigation. To maintain your status as a student organization, Risk Management Protocol is mandatory for all registered student organizations.
- Step 4 –Finalize the registration process by Registering your RSO on RamLink by signing in with your eID and password and selecting 'Organizations'. Click type your organization's name then select the blue re-register button. If a gray 'Not Available' is displayed then the registration period is closed.
- If you need help with the registration process contact the RSO team at the SLiCE office.
- Step 3 – Prepare to answer questions and share your student org's plan for risk mitigation. To maintain your status as a student organization, Risk Management Protocol is mandatory for all registered student organizations.
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- If you need help with the registration process contact the RSO team at the SLiCE office.



RESOURCES

SLiCE

SLiCE stands for Student Leadership, Involvement, and Community Engagement. SLiCE works collaboratively with students, faculty, staff, and community partners to offer a range of enriching and educational outreach opportunities. The SLiCE office has a team dedicated to supporting student organizations. They provide leadership development, advise on officer transitions, give event planning tips, provide one-on-one coaching for student officers, and provide risk management guidance.

- Contact the RSO team via email or by visiting them in room 210 of the LSC.
- slice_studentorgs@colostate.edu
- The SLiCE Office has accountants on staff who are eager to assist RSOs with their financial questions. If you need to know anything about your organization's financial management, financial forms, PCard training, or SOFA logistics please email the accounting team.
- slice_accounting@colostate.edu

The Student Organization Center

The Student Organization Center, commonly referred to as the SOC, is a student fee funded area located in LSC Room 141 across from the RamSkellar and next to Office of Fraternity and Sorority Life.

This multipurpose space is equipped with a ping pong table, lounge area, a work space, and meeting room. RSOs will find a variety of communal supplies plus a community posting board to publicize events. The SOC also stores RSO mail and has a limited number of lockers.

The materials in the SOC are for all RSO members to use. It's important to be good stewards in this space, so take only what you can use and clean up after yourself.

Resources in the SOC include:

Meeting Room/Work Space

- Conference room (LSC 140)
- Large screen TV
- Giant white board
- Table and 18 chairs
- Reserve through LSC Event Planning Services
- Great space for your weekly meetings

Various Supplies

- Button maker
- Laminator
- General craft supplies including various colored paper, colored pencils, and markers

Community Posting Board

- Located in the SOC main area
- For RSOs and CSU departments only
- Include event date, time, location, RSO name, and contact information; materials without event details will be removed
- Use to promote upcoming events or for RSO recruitment

Organization Mail Boxes

If your RSO needs to receive mail, send it to the SOC for pick up rather than using a student officer's home address.

Address format:

Full name of the RSO
(no abbreviations, acronyms, or officer names)
8033 Campus Delivery
Colorado State University
Fort Collins, CO 80523-8033



Organization Lockers

- 70 lockers available on a first-come, first-serve basis
- Long-term and short-term use
- For RSOs only
- See the RSO Handbook for prohibited items

To apply for a locker:

- Indicate your request on the RSO's RamLink registration or contact the RSO Team at SLiCE
- President or financial officer must read and sign the locker contract
- When your club has been assigned a locker, you will receive the combination and locker number to access

RamLink

We've mentioned RamLink a few times in this module. What is RamLink? RamLink is CSU's online involvement portal. It is a great place to learn of upcoming student-led events as well as manage your organization's webpage and to streamline your organization's documents including the constitution, meeting minutes, financial reports, and transition documents.

You can also use RamLink to manage your membership roster, create forms and sign-ups, market and invite the CSU community to your event, track service hours completed by your members, conduct officer elections, and share updates about your organization. RamLink is also the centralized location for SLiCE's annual RSO registration process.

RSO Handbook

The RSO Handbook will help you find answers to many questions about operations, deadlines, University policies, fundraising opportunities, and more. It can be best described as an extended manual for items referenced in this orientation. It's recommended that the officers and advisors download the latest version of the RSO Handbook at the beginning of each academic year.

Visit rso.colostate.edu to download your copy.

UNIVERSITY POLICIES

In this section we'll talk about several important University policies and procedures to help you successfully operate your RSO. Failure to adhere to University policies may result in consequences. For more information visit the RSO Handbook mentioned earlier or the University's Policy Library located at policylibrary.colostate.edu.

Graphic Standards

There may come a time when you want to design a T-shirt or other club-themed items for your student organization. RSO's are allowed, and encouraged to use University logos, but they are not required to do so. You must follow graphic standards rules when using any of the University official marks.

If your RSO decides to create an independent logo, avoid any design that includes any University's logo, including the Ram's Head.

Visit the CSU brand website at www.brand.colostate.edu for more information about logo usage and available downloads.

Licensed Vendors

Colorado State University is the sole owner of its name, symbols, graphics, and marks. Only officially-licensed vendors may apply CSU registered marks to products. To ensure all products are manufactured under fair labor conditions, CSU has adopted a code of conduct for all licensed manufacturers.

Visit licensing.colostate.edu for a list of licensed vendors.

Sales Tax

University policy states that sales tax needs to be collected on all tangible merchandise sold. Sales tax does not need to be collected on dues, ticket sales, entrance fees, and services. If RSOs have an off-campus account, they must complete all tax reporting on their own.



Contracts

As a student or student organization, you should not sign or verbally agree to a contractual agreement. If you do, you may be held personally liable for the payment. Contracts are not considered binding to CSU until an authorized University employee has reviewed and signed it.

Additional things to consider when hosting a speaker or guest performer include lodging, airfare, speaker ground transportation, and meals. These expenses are paid through an honorarium. SLiCE does not make travel arrangements for speakers or performers. Visit the RSO Handbook for information about CSU Performance Event Contracts.

FINANCIAL OVERVIEW

Terms

- **SOFA:** which stands for Student Organization Funding Account. It is an on-campus account maintained by SLiCE.
- **Personal Reimbursement:** students can be reimbursed from their SOFA for items purchased with their own money as long as the amount is under \$1,000 and the items needing to be reimbursed are qualified purchases.
- **Internal Orders:** commonly referred to as an IO. This is an on-campus purchase document. For example for the Collegian or LSC.
- **Disbursement Voucher or DV.** This is for an off-campus purchases under \$5,000.
- **Procurement Card:** more commonly called a PCard. PCards are a University authorized credit card. They are available to trained RSO officers to make purchases related to organizational business.
- **Travel:** processing of travel expenses for items like airfare, hotel, mileage, and per diem.
- **Honorarium:** is a voluntary payment to a professional person outside the University



STUDENT ORGANIZATION FUNDING ACCOUNTS

A SOFA or Student Organization Funding Account is an on-campus account maintained by SLiCE. It is not a bank account. The RSO financial officer must meet with a SLiCE accountant to create an account. Plan ahead because it can take up to two weeks to open a SOFA. Account closures will be processed only if the RSO does not complete the annual registration process and has no activity in their SOFA for two consecutive fiscal years. Funds remaining in the account will be transferred to the Student Organization Center for supplies used by all RSOs. Funds cannot be transferred to an off-campus financial account. Contact a SLiCE accountant if you are unsure if your RSO has a SOFA or you need to know your SOFA number or balance. Contact the SLiCE accounting team via email at: slice_accounting@colostate.edu

SOFA Limitations

There are important exemptions for SOFA spending.

- CSU Employee Payments: University employees, including student employees, cannot be paid for services by your SOFA. Make sure individuals are not employees before agreements are made.
 - Donations: State rules and regulations do not allow State monies to be used for donations to outside entities. Any fundraisers for an outside entity, donors should make checks payable to the benefiting organization or into a non-university financial account.
 - Prizes and Awards: payments made to individuals in recognition of some past accomplishments or activity. All prizes and awards require a written statement signed by the appropriate college dean or vice president documenting the purpose of the award, criteria for eligibility, and selection process.
 - Purchasing Gifts. Per State rules and regulations, purchasing gifts, gift certificates, gift cards, and flowers is not allowed. When you want to thank or recognize someone you can make a certificate of appreciation; purchase a reasonably priced engraved plaque; or take a collection of money from RSO members to use for the purchase or gift.
- Because CSU is a tax-exempt entity, RSOs with a SOFA may use the University's tax-exempt number when making purchases. Tax-exempt purchases can be made with a PCard, Disbursement Voucher, or with contracts. Any other use of this number must be approved by the Division of University Advancement prior to the purchase.

SOFA Do's and Don'ts

- SOFAs should be used for day-to-day expenses such as food for meetings, T-shirts, speaker fees, room charges for meetings.
- If working with a CSU department to fund an event, activity, or travel, please meet with a SLiCE accountant. They can help ensure proper financial procedures and State of Colorado guidelines are followed.
- You'll also want to contact a SLiCE accountant for approval to hire an independent contractor or new vendor. Adding new vendors can take up to three weeks to process. Approval is required BEFORE any work can begin.
- SLiCE is prohibited from processing financial transactions for entrepreneurial business or for-profit businesses or commercial enterprises.
- University employees, including student employees, cannot be paid for services by your SOFA. Please ensure individuals are not CSU employees before making agreements.
- State rules and regulations do not allow any State monies to be used for donations to outside entities.
- Per State rules and regulations, purchasing prizes, gifts, gift certificates, gift cards, and flowers is not allowed.
- SOFAs are not able to accept CSU department fund transfers in "support of programs". If a CSU department or college is helping fund or co-sponsor a program or event, the expense should reflect directly from the sponsoring department



State of Colorado Purchase Restrictions

The following purchases have restrictions placed on them due to State of Colorado rules and regulations for spending money. Do Not Purchase the following items:

- Alcohol
- Greeting cards
- Banners (must use Colab, FastPrint or a licensed vendor)
- Bulk Printing (must use CoLab, or FastPrint)
- Capital Expenditures (one-time use items, i.e., a ping pong table)
- Computers (CSU has a contract with Hewlett Packard)
- Deposits or prepayments are not paid by the University
- Furniture
- Office supplies (must use CSU Bookstore or Office Depot)
- Postage/Freight charges cannot exceed \$250, unless a purchase order has been requested in advance

PCards

- SLiCE offers a University issued credit card, commonly referred to as a PCard, for making purchases in-stores and online. Only currently registered RSOs with a SOFA containing sufficient funds to cover purchases will be authorized to use a PCard.
- Only one authorized student officer can be PCard trained. Two authorized signatures are required before a purchase can be made. Authorized users cannot check out the card, then share the card with someone else.
- For online purchases, getting a sales tax exemption can be extremely challenging. Talk with a SLiCE accountant for special instructions regarding online purchases. RSOs are encouraged to buy items locally, rather than purchasing online.
- If your purchased items are damaged or did not meet expectations, please work with a SLiCE accountant to get a refund and complete the proper documentation.

PCard Violations and Consequences

Users who receive a PCard use violation may lose their privilege to use the card. For an RSO with only one PCard-trained user, this can be detrimental. All violations will be handled with SLiCE and the Procurement Office.

For a thorough explanation of PCard violations and consequences, visit rso.colostate.edu



RSO BUDGETS

Balance Sheet/Budget

INCOME ITEMS	PROJECTED	ACTUAL
Opening balance		\$350
Member dues	\$600	\$570
BSOF Grant	\$300	\$2000
Sponsorship	\$3000	\$1000
Fundraising	\$2500	\$1500
Total	\$6400	\$5420

EXPENSE ITEMS	PROJECTED	ACTUAL
T-shirts	\$175	\$350
Office supplies	\$30	\$25
Fall event	\$2700	\$2347
Spring event	\$1300	\$1743
Marketing	\$150	\$134
Total	\$4355	\$4559

Budget Tracking/Ledger

DATE	DESCRIPTION	INCOME	EXPENSE	PCARD, DV OR REIMBURSEMENT	BALANCE
1/1/2021	Opening balance				\$750
2/14/2021	COLAB marketing		\$58	PCard	-\$58
					\$692
2/19/2021	Involvement fair candy & supplies		\$43	PCard	-\$43
					\$649
3/8/2021	Proceeds from RamRide	\$371			+\$371
					\$1020
4/26/2021	Member T-shirts		\$320	Reimbursement	-\$320
					\$700



FUNDRAISING

As you know, fundraising and grants include the process of gathering contributions of money or other non-cash resources from individuals, organizations, and businesses.

On-Campus Fundraising

- Bake sales
- coffee sales
- Rams for Change
- LSC Flea Market
- RamRide

Off-Campus Fundraising

- Crowdfunding or Ramfunder – like a GoFundMe.
- Landmark Event Staffing allows RSOs to work during home football games as well as other community events to earn money for their RSO.
- Some local businesses host a percentage of sales as a fundraiser.
- Donations and solicitations processed through the CSU Foundation are subject to a 5% administrative fee.

Grants

- The ASCSU's Board of Student Organization Funding, commonly referred to as BSOF. This is a great resource for hosting educational and cultural events.
- Traveling individually or with your RSO to attend an educational or leadership conference or competition? Apply for an ASCSU Travel Grant.
- Need beverages for an event? Consider the Coca-Cola Campus of Character Beverage Grant, commonly referred to as the Coke Grant.
- Have an event or project that focuses on art, music, or humanities? Check out the Lilla B. Morgan Memorial Endowment.
- Hosting an event in the residence halls? Apply for the Residence Hall Association Bill.
- Are you a graduate student? Consider a Travel Grant through Graduate Student Council.

The funds earned from these fundraisers and grants require a SOFA to participate. Check the RSO Handbook for more details.



QUIZ

You must pass with at least 80 percent (you can miss up to two questions).

- 1. SLiCE provides which resources for RSOs**
 - The RSO Handbook
 - RSO bi-weekly digital newsletter
 - RSO website: rso.colostate.edu
 - All of the above
- 2. RSOs must adhere to university branding and licensing for graphic standards and licensed vendors.**
 - True
 - False
- 3. Which statement is NOT one of the minimum standards of recognition?**
 - RSOs must have a minimum of 3 student members
 - All members must practice share and practice the same beliefs
 - The org's president and financial officer cannot be the same person
 - The org must have an eligible advisor
- 4. What is an honorarium?**
 - Using a coupon to render payment
 - A voluntary payment to a professional person outside of the University community
 - A receipt from an online vendor
 - A feature on RamLink
- 5. To reserve a room through Event Planning Services at the discounted rate**
 - An RSO must be registered with SLiCE
 - The RSO president and financial officer must be on the RamLink roster
 - The RSO must have a SOFA
 - All of the above
- 6. Student Organization Funding Account (SOFA) is an on-campus account maintained by SLiCE.**
 - True
 - False
- 7. An itemized receipt is required for any purchases made using a PCard. What is an itemized receipt?**
 - A receipt that contains complete details of the entire purchase
 - A receipt without details of the purchase
 - A bill with only the sum due
 - A jar of marbles
- 8. Which of the following purchases are restricted?**
 - Flowers, gifts, gift certificates and gifts cards
 - Making donations from SOFA
 - Payments to employees of CSU for services
 - All of the above
- 9. RSOs should never sign their own vendor contracts.**
 - True
 - False
- 10. RSOs should connect with SLiCE accountants before using their SOFA to pay for a venue, performer, photographer, etc.**
 - True
 - False
- 11. What steps must be completed to earn annual SLiCE recognition?**
 - President and financial officer must individually complete their officer orientations
 - Submit RamLink registration form
 - Have an eligible advisor
 - All of the above
- 12. Which office do you contact to reserve rooms in the Lory Student Center, including the Plaza?**
 - CSU Facilities Management
 - Event Planning Services
 - The Registrar's Office
 - Housing and Dining
- 13. SLiCE offers resources that can help streamline the transition between officers.**
 - True
 - False
- 14. I should contact a SLiCE accountant to**
 - Set up a SOFA
 - Check the balance in my SOFA
 - Learn budgeting tips
 - All of the above