2018 Club Signer Workshop
Today’s Agenda

9:45-10 Check In

10-10:05 Introductions

10:05-12 Social Justice Training

12-12:30 Lunch

12:30 Check Back In

12:30-1:30 Treasurer’s Workshop

1:30-1:45 PR Presentation

1:45-2:15 LYNX Presentation

2:15-3 Club Sports
Club Affairs Committee

We are here and happy to help with anything you or your club need. If we are unable to help you, we are able to help make the connection.

A few things coming your way from our committee:

- Club Check-in during the end of the Fall Semester.
- Club Check-in during the middle to end of the Spring Semester.

Our office hours:

<table>
<thead>
<tr>
<th>Name</th>
<th>Days</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cammy</td>
<td>T 3-6 and W 12-2</td>
<td></td>
</tr>
<tr>
<td>Meg</td>
<td>T/Th. 1-2:30</td>
<td></td>
</tr>
<tr>
<td>Cody</td>
<td>M/F 11-12</td>
<td></td>
</tr>
<tr>
<td>Tucker</td>
<td>T/Th. 3-4</td>
<td></td>
</tr>
</tbody>
</table>

We are all happy to meet with you during office hours, or by appointment.

The chair of the Club Affairs Committee is Cammy Schiller and you can reach her by emailing her at clschill@uvm.edu.

Here are some important contacts to have within the SGA community:

Business Accounting Specialist: Blanka Caha, Blanka.Caha@uvm.edu

SGA Office Coordinator: Sara Gabaree, sara.gabaree@uvm.edu

Club Sports Coordinator: Leon Lifschutz, leon.lifschutz@uvm.edu

Financial Assistant + University tickets coordinator: Constance Paun, constanta.paun@uvm.edu

For a list of the full SGA Senate, please visit our SGA Website: www.uvm.edu/sga
Advertising 101

Be Creative
● Think outside the box. Be different! Be memorable!

Be Consistent
● You won’t have 5,000 like on Facebook in a day.
● Stay organized.
● Be persistent.

Reach Far
● Don’t just put up posters in the Davis Center. EXPAND. (Trinity?)
● Try new medias and methods.

But Keep it SIMPLE
● Don’t overload someone with a poster. Keep it simple and give them the information they need.
● Use canva.com

Social Media: The Final Frontier
● Be consistent, don’t leave your audience waiting.
● Use Facebook scheduler.
● Use the Class Facebook groups.
● Invite friends to “like” the page and share every post.
● Link with other groups/UVM.

Some FREE resources to use on campus
● Davis Center
  ○ TV’s
  ○ Banners!
  ○ Tabling
  ○ Display cases in the tunnel
  ○ Bulletin Boards
● Student Life
  ○ Cody Silfies, Assistant Director for Marketing
  ○ THEY MAKE GREAT POSTERS
  ○ UVM Bored
● BUSES
  ○ A bus sign, SO COOL!
● How SGA can help YOU!
  ○ Our Public Relations Committee
    ■ Monthly emails to the student body about you are all doing.
    ■ Weekly highlight on our Facebook and Instagram pages.
    ■ Recognize you for all that you do!
    ■ Feel free to reach out to Owen Doherty at any time!

Owen Doherty, Chair of the PR Committee, can be reached by emailing him at oadohert@uvm.edu.
LYNX Help

What is it?

Why did we purchase The Lynx?

- Need for elections
- Web presence
- Form collection
- A management tool for Student Leaders
- Secure sign ins and permissions

The Lynx is a tool purchased and managed by SGA. This tool helps students interact with and manage club participation.


How does it benefit students?

This tool helps with the following

- Facilitating student involvement logistics such as
  - Managing your organization
    - Elections
    - Registration
    - Document Storage
    - Event attendance
    - Form collection
  - Recruiting and Web presence
- Reporting
  - Overall involvement
  - Involvement by demographic characteristics
  - Add to a custom retention and academic success predictive analytic

Need to use it for

- Registration
  - Up to date home page and contact info
- Events
  - Financial Forms
- Rosters
  - Keep club signers updated

***SGA will be requiring all of these items to be regularly updated this year and will be included in evaluations of status and funding***
Other Benefits

- Discussion board within group
- Elections
- Form collection
- Data reporting
- Photos
- Document storage
- News functions
- Track service hours
- Primary web presence
- Messaging

Additional Information Management

- The Lynx can hopefully meet most of your information management needs. However, other tools exist you may want to use when it cannot.
- Communication – Slack, groupme, Microsoft teams, Mailchimp
- Collaboration - Google Drive, Dropbox
- Social media platforms - you should link these to your Lynx page
Treasurer’s Workshop

Purchase Orders

**How to fill out PO Request**

- **Source number = 800xxx, NOT FUND**
- **Give the FULL vendor name and address, this includes the Zip Code**
- **When renting a vehicle/bus give ALL of this information**

<table>
<thead>
<tr>
<th>Source Number = 800xxx, NOT FUND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hurry and ASAP are NOT a date</td>
</tr>
<tr>
<td>Select the fund(s), (130 or 131)</td>
</tr>
<tr>
<td>For food orders give ALL of this information</td>
</tr>
<tr>
<td>Remember: For a check – you must have some type of quote/invoice/statement saying you owe the vendor something!</td>
</tr>
</tbody>
</table>

- Do NOT commit money to any vendor before PO
  - Unauthorized Spending
- Have ALL necessary paperwork before dropping anything in the PO box
  - Invoice, W9, Independent Contractor, etc.
  - Paperclips!
- Respond promptly to notices from Treasurer
- A request copy will arrive in club’s mailbox
  - R# & P#

**Blanket Purchase Orders**

- Created when multiple expenses to the same vendor are expected for recurring orders (5 or more)
- Some examples
  - Repeated vehicle rentals from the same external vendor
Monthly fees
- Convenience

Additional Documents for Purchases

- Payment to an individual for providing a service
  - W9 Form for new vendors
  - Independent Contractor Form (each payment)
  - Base Contract Form or invoice
- Purchase of products with University symbols or “UVM”
  - Licensing Waiver – link on SGA website
  - No order before approval
- Ordering office supplies (no PO request form needed)
  - Use UVM Bookstore/Print & Mail Center
    - Orange Slip
- Staples - Credit Card (see Sara)

W9 Form

- Federal Law and UVM policy require W9 for all vendors
  - Employee ID# or SSN must be on the signed W9
  - HINT: if SSN provided, Independent Contractor Form
- Needed before the PO request can be submitted
- Submit for new vendors only
Base Contract Form

- All contracts must be signed by vendor before requesting Director of Student Life’s signature – required for all contracts
  - longer process

Hiring Student Employees

- Few clubs approved to hire employees
- All new hires must be discussed with Blanka before work begins
Account Details

- Chartstring
- Source Numbers

Credit Card Purchases

- Can be used when other forms of payment are not acceptable
  - Examples: hotels, plane tickets, online purchases
- Can only be used within the Galaxy Space during the Finance Office business hours
- See Finance Office when making a Credit Card purchase for form, then bring it to Sara at the front desk

‘Orange Card’ (Charge card)

- Used to pay for purchases within University
  - Ex: Print and Mail Center, Bookstore
- One transaction per card
- Authorized by a SGA authorized signer (Sara/Blanka/Jared)
Food Purchases

- 130/cultural/food-centered orgs only
- University-wide policy requirements
- Sodexo catering waiver is needed for outside catering on campus, except:
  - Purchasing pizza
  - Catering by University approved vendors
  - Potluck for club members
- The catering waiver must be submitted online through the Conference and Events Services website. Please allow at least 2 weeks for approval

Petty Cash

- Used sparingly – gas/tolls
- The responsibility is placed on Custodian
- Closed out with receipts and remaining cash following Tuesday
- One Petty Cash Request out at a time
- Two signatures (Clubsigner and Custodian)

Axiom Reports

- 4 reports dispersed monthly from sgafnanc@uvm.edu
- Keep track of transactions made on your 130 and 131 accounts
- Inform Treasurer or Finance Office ASAP of any charges that you do not recognize!
- Additional information on how to read reports is on the SGA Resources for Clubs website
- NOTE: depending on when a credit card purchase was made, the transaction might appear on a later report

Vehicle Rental
- Risk Management approval for driving all rentals
Minimum age of 19 years old
Course certification
  ■ http://www.uvm.edu/~riskmgmt/?page=driver_train/index.html
Transportation policy:
    ■ 2 drivers needed for trips over 50 miles from campus
No more than 2 vehicles can be rented per destination
  ■ Bus needed due to risk management policies
If you have a blanket purchase order with Avis or Hertz, please see us for additional paperwork

SGA Vehicles

- Must be reserved no more than four weeks in advance
- SGA Fleet
- 8 Vans (12 passenger) at $70/day
- 1 pick-up truck at $60/day

Outside Vendor Vehicle Rental/Travel

- Outside vendors- thru purchase orders
- Cars/vans
  - Avis (12 passenger vans) - reserve by email or phone (5+ days, driver names)
  - Hertz – (cars/SUVs) reserve thru Lynx
  - Enterprise (driver must be at least 21 years old) – reserve online
- School Bus (quotes from each vendor, both contracted vendors)
  - First
  - STA/Mountain Transit
- Coach Bus
  - Premier Coach (contracted vendor, must go to Premier first)
  - Lamoille Valley Coach
- These purchases require a purchase order
  - Must fill in additional information section of Purchase Order Request Form
Renting from Avis & Hertz

Loans

- Granted with approval of SGA Treasurer
- LT Projects/Down Payments
- Repayment schedule
- SGA reserves the right to derecognize an organization for failing to repay
- No interest applied

Deposit Slips

- Checks, unused petty cash, and occasionally cash
- Checks **MUST** be made payable to the University of Vermont or UVM
- Copies of checks must be attached

---

**University of Vermont Deposits**

**SGA Purchasing Portal**

- Online payments - **USE PERSONAL DEVICES ONLY**
- For the collection of dues/memberships/fees
  - Opens to T-shirts, etc.
- Reduces risk of carrying cash & holds club-signers and members accountable
- Fees associated with the platform
- Contact uvmsga@uvm.edu

**Reserving Space on Campus**

- Use online server, Virtual EMS
  - [http://emsweb.uvm.edu/virtualems/](http://emsweb.uvm.edu/virtualems/)
  - Easily found through UVM A-Z search
- Space must be clean to avoid charges
- Make reservations at least 7 days in advance
- Uvm.edu/sga for more instruction
Supplemental Funding

- Gas Supplemental
- Capital Funding
- Nationals Funding
- Diversity Enhancement Funding
- Uniform Funding
- Professional Development
- Wellness and Engagement Fund
- is needed for requests over $2,000
- All Supplemental Funding requests must include evidence for or intention of fundraising and completed forms
- Submit forms on the Lynx by 12 noon on Fridays
  - Hearing with Finance Committee for all requests except Gas, Tolls, and Travel Accommodations
  - Requests over $5,000 require an advisor's email approval
  - SGA Senate approval
- Used for unforeseen expenses
  - Qualifying for competition, conference arises
- Used for Travel Accommodations
  - General guidelines:
    - Hotels: Up to $120/night/room with 4 people/room
    - Flights: Up to $1,000/semester for 2 people
How to request Supplementals...

**Step 1:** Log onto the Lynx at [www.uvm.edu/clubs](http://www.uvm.edu/clubs)

**Step 2:** Search for SGA Finance Committee

**Step 3:** Select appropriate form

**Step 4:** Follow all instructions on form and submit. You will receive an email confirmation shortly after submission.

**Step 5:** Check email periodically for scheduling of hearing time (except gas)
Response and allocation will be communicated via email by noon on the following Thursday.

Further information may be requested post-hearing if necessary.

Bring all quotes and signatures to hearing & other supporting documents to hearing.

**General Supplemental Fund**

- Supplemental funding for club members that require funding for additional accommodations/event/registration, but as a new budget item.
- Meeting with Finance Committee required.
- Club-signer or member can submit form using the General Supplemental Fund.
- Subject to total fundraising requirement.

**Uniform Funding**

- Eligible every three years.
- Detailed distribution plan for storing and maintaining uniforms.

**Gas Supplementals**

- Because gas prices are variable, gas is never budgeted for.
- Include route and mileage.
- Please request funding for tolls through the General Supplemental.
- Follow the equations to calculate the estimated cost.
- This must be done before traveling.
- No reimbursements will be made for any club expenses.

**Nationals Funding**

- Expenses for qualifying national events. This is an acknowledgement of achievement.
- More flexibility on funding caps.

**Diversity Enhancement Fund**

- Can be used for events cultural or religious in nature in order to enhance diversity and to benefit the campus.
  - Examples: holiday events, speakers, etc.
- Food may be allocated for under some circumstances per the discretion of the Finance Chair.

**Capital Projects**

- Special funding available for tangibles with life expectancy of > 5 yrs.
- Price quotes for the item(s) and additional supporting information.

**Wellness and Engagement Fund**
- Funding for events that promote healthy activities on weekends determined “high risk” for alcohol and other drug use and abuse
- Dates determined by the President’s Committee on Alcohol and Other Drugs
- Any dates not listed will be considered upon formal request by the Finance Chair
- Funding is also provided for events promoting and contributing to positive mental health
JOIN THE OFFICE OF STUDENT & COMMUNITY RELATIONS
FOR SOME FUN, UPCOMING EVENTS!

Each semester, the Office of Student & Community Relations hosts a meet-and-greet for area families in need of responsible babysitters and UVM students interested in a babysitting job.

Registration and information: uvm.edu/oscr

Join OSCR at the Mosaic Center for Students of Color for a delicious, hot, FREE breakfast from 9AM to 11AM on September 21st.

This event takes place every Friday at the MCSC in Living and Learning building E-140; open to the entire UVM community – join the MCSC for food and friendship. Hosted by different groups each week.

See you there!

Did you just sign a lease and realize that you have some problems and are not sure where to get help to resolve them?

Are you thinking about moving off campus next year and feel lost in the process of even finding a place?

This FREE workshop provides information, advice, and resources to help your transition off campus be a positive experience. Successfully completing this 90-minute workshop means you receive a FREE UVM Preferred Renter Card and Off Campus Living Guide!

Also, FREE dinner provided.

Registration and information coming soon: uvm.edu/oscr
Why UVM Chose the Education Advisory Board (EAB)

College is complicated. The Student Success Collaborative (SSC) helps students and advisors navigate the many available resources that promote student success, during their UVM years and beyond.

We joined the EAB SSC because we want to:
- Enhance the student experience
- Support effective and integrated practices in advising
- Increase retention and graduation rates
GUIDE APP

STAY ENGAGED
Ready-to-use To-Do List and Calendar
Explore majors and careers

BE PROACTIVE
Keep track of advising appointments
Learn about and resolve holds

KEEP ORGANIZED
Access campus resources
View course schedule

Campus and Guide Platform Overview

**EAB Campus**
Student Support Services, Academic Leaders, Administration

- Advanced Search
- Referrals and case management
- Appointment reports and shared notes
- Early alerts
- Intervention campaigns
- Front desk management

**Guide**
- Personalized student path
- Intake survey
- Quick polls
- Push Notifications
- Student calendar
- Health Center
- Major Explorer
- Campus Resources

Guide empowers students to take ownership of their journey through customized mobile interventions and ability to reach out for support.

Tools in Campus facilitate the work and collaboration of advisors and support providers behind-the-scenes of the student experience.
GUIDE APP CONTENT

CALENDAR EVENTS
- Academic Calendar
- Department Deadlines
- University Holidays
- Examples:
  - Welcome Week
  - Add/Drop Deadline
- Fall Recess
- Reading Days – by term

GUIDE APP CONTENT

Resources
- Category Examples:
  - Academic
  - Campus Services
  - Involvement
  - Identity Centers
  - Career & Experience
  - Health & Wellness

Handshake
* Find and apply to jobs and internships * Get your resume or cover letter reviewed * Register for on-campus events like workshops and career fairs

https://uvm.joinhandshake.com
GUIDE APP CONTENT

To Dos
Established by Class Year
Mandatory and Optional
Start and End Dates
Example Topics:
Health and Wellness
Preparing for Graduation
Getting a Job

Submit your FAFSA for next year
Thu, Jan 03 - Sat, Jun 29
Did you know that you have to file your FAFSA annually to make sure you’re eligible for financial aid in the upcoming academic year?

Finances can change from year to year, and that’s why filing your FAFSA each year is so necessary and important. File by June 30.

Complete next year’s FAFSA

Helpful Resources

Student Financial Services
Student Financial Services
This is UVM’s hub for financial aid basics, scholarship resources, billing and pa...

HOW YOU CAN HELP

1. Be Guide Champions
2. Take pulse checks with students
3. Offer feedback and ideas
GO.UVM.EDU/GETGUIDE

HOW:
- Download the app
- Select: University of Vermont
- Login with UVM ID and password
- Say "yes" to push notifications
- Complete the survey

WHY:
- View your course schedule
- Get timely notifications/reminders
- See the academic calendar
- Explore majors and careers
- 💚 College or School Student Services

OR GET GUIDE ON YOUR DESKTOP: UVM.GUIDE.EAB.COM

QUESTIONS

About student success initiative (overall), processes, policies, best practices for using SSC, etc.
Sarah Warrington
656.9652, swarrington@uvm.edu

About end user support (i.e. log in or user access, permission settings, configurations, functionality, etc.)
studentsuccess@uvm.edu