

Policy Title:	Student Organization Resource Handling
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Governing Body:	Southern Oregon University	Policy Number:	SAD.018
Policy Contact:		Date Revised:	
Custodial Office:	Office of Student Life	Date Approved:	February 19, 2018
Approved By:	President	Next Review:	
Related Policy:			

Revision History

Revision Number:	Change:	Date:
	Initial version	February 2018

A. Purpose

The purpose of this policy is to provide clear expectations of student organization spending, generation, and management of monies/resources.

B. Definitions

- (1) “Resource” means any circulating medium of exchange.
- (2) “Student Organization” means any officially recognized student-run organization of Southern Oregon University (SOU), with a constitution and/or bylaws.
- (3) “Student Fee” refers to Resources collected and disbursed to student-run organizations from the SOU incidental fee.

C. Policy Statement

All Student Organizations are responsible for the Resources in their organization accounts. With the exception of ASSOU, the president of the Student Organization has primary responsibility for the Resources in its organization account. ASSOU bylaws dictate the responsible party for Resources from different units of that organization.

Student Organizations funded by student fees should base their expenditures on approved events in their budget. It is important that all organizations spend their Resources in the best interest of their members, and in accordance with

the university's policies and financial procedures. Any violation of the policies set forth below may result in remedies, restrictions, or sanctions on the Student Organization, including but not limited to placement of a hold on all events and transactions, loss of Resources, loss of recognition, and a hold on a student's records/transcripts. Students, volunteers, and advisers who are individually at fault may be removed from their positions and/or referred to the Office of Student Support and Intervention for Student Code of Conduct violations.

- 1) All organizations are required to keep their Resources in an account established by the Office of Student Life. No separate accounts, possession, or other holdings of Resources are permitted. Fundraising websites, such as GoFundMe and Venmo are strictly prohibited.
- 2) All transactions must go through the club account maintained by the Office of Student Life. This includes any income for deposit, any expenses requiring payment or reimbursement, and any membership dues. Deposits of any kind should be brought to the Office of Student Life within one business day. Monies deposited for Student Organization member-dues are non-refundable.
- 3) Student Organizations may check out cash boxes for official organization business in the Office of Student Life. Cash box requests must be made at least two business days in advance in an SOU Connect event request to ensure availability of cash boxes. One student must sign out the box and may check out up to \$100 in cash. The student must agree to be personally responsible for the cash advance in the event the money is lost or stolen. The student must return the cash advance and cash box by the agreed upon day and time in the SOU Connect event request. If the student fails to return the cash by the agreed upon day and time, then the student will be charged the amount lost and the student will lose all future privileges of checking out cash boxes and cash from the Office of Student Life. If an extension is needed on returning the cash box and cash, the student should contact the Assistant Director of Student Life immediately.
- 4) Students identified as “fund approvers” on SOU Connect are the individuals authorized to access Resources in a Student Organization's account. The advisor and/or faculty/staff members and/or volunteers have no authority to access Resources in Student Organization accounts.
- 5) Account balances may be accessed any time by submitting a request to the Office of Student Life. A Student Life staff member regularly reviews Student Organization transactions and balances. However, the Student Organization must also monitor all financial activity for the Student Organization.
- 6) Deficits must not occur in Student Organization accounts. A Student Life staff member and the Student Organization officers work together to prevent deficits. If a deficit occurs, the Student Organization must deposit Resources to cover the deficit within one week from the time it occurs. When necessary, Resources must be collected from members for deficits. If this does not occur, the individual student(s) who took the account into deficit will be held accountable as dictated in the enforcement section of this policy.
- 7) All organizations have access to three types of Resources:
 - a) Student Fee Resources: 1) An emergency Student Fee Committee (SFC) request 2) An annual request to SFC or 3) Inter Club Council Allocations Committee. Spending the funds requires following Student Fee and university spending policies. All unused Resources are returned to the Student Fee reserve at the end of the period of time a Student Organization was given to spend.
 - b) Tax Deductible Resources: Student Organizations inherently have an educational purpose connected to the activities of the club. To that end, Resources may be received from donations and fundraising that involve the donation of Resources with no expectation of anything in return on the part of the individual/organization

providing the Resources. Monies and in-kind donations given to a club without an exchange of a service or good must be spent according to donor wishes and the Resources carry forward for the Student Organization each year. Resources held in university gift indexes must follow university spending policies. Resources held at the SOU Foundation must follow SOU Foundation rules and policies.

- c) Organization Resources: Resources received from dues and fundraising. Spending the Student Organization Resources allows more flexibility, and the Resources carry forward each year for the organization. University spending policies must still be followed.
- 8) Donations to Student Organizations in an amount less than \$1,000 will be kept in the general Student Organization university gift account and will be allocated to the Student Organization. Student Organizations receiving more than \$1,000 will create a university gift account to house such Resources.
- 9) Student Organizations may receive donations from outside sources. Donation deposits must be made in the Office of Student Life with oversight from Student Life staff. All gifts to the university and SOU Foundation are assessed an administrative fee. To acknowledge a gift, it is necessary to have the following information: date of gift, donor's name, mailing address, type and amount of gift, and purpose of gift.
- 10) If a Student Organization wishes to actively campaign for Resources from sources outside the university, it must coordinate those efforts with the university's Development Office with advisement from the Office of Student Life.
 - a) Student Organizations must work with the Office of Student Life to coordinate raffles. Raffles may be approved at the discretion of the SOU Foundation, which carries the raffle license pursuant to Department of Justice regulations.
 - b) Soliciting local businesses, national corporations, or individuals for \$1,000 or more during a year must be approved by the Development Office.
 - c) Fundraising that involves door-to-door contact, telephone sales, cash collection boxes, soliciting loose change donations, or furthering off-campus commercial or political interests will not be approved.
 - d) Charitable drives to collect non-monetary contributions such as food, clothing, books, or supplies are subject to the same guidelines and approval processes as fundraising activities.
 - e) Any in-kind donations must follow the university/SOU Foundation Gifts-In-Kind policy. Student Organizations can work with the Office of Student Life to ensure compliance.
 - f) Any letter writing campaign to raise Resources must use the letter writing campaign template and final wording must be approved by the Assistant Director of Student Life and the Development Office.
- 11) Any Resources that are fundraised for non-SOU charitable institution(s) must be directly donated to the charitable institution(s). Student Organizations may fundraise for charitable institution(s), but all checks and cash donations must be made out to and/or directly deposited with the particular charitable institution(s). It is the responsibility of the Student Organization president to ensure (a) that the amount collected is accurately reported to the Office of Student Life within one (1) business day and (b) that all Resources raised are deposited with the charitable institution(s) within three (3) business days. The Student Organization president should have another person from the Student Organization present when its collections are provided to the third-party charitable institution(s) (in person or by mail). The Student Organization president will collect a receipt from the charitable institution(s) which is to be given to the Office of Student Life within three (3) business days of receiving the receipt. Checks should be written to the charitable institution(s), not an SOU organization. Donations cannot be deposited into a university account with the intention of making one check donation to a charity. University and SOU Foundation Resources cannot be used as a donation to external charitable institution(s).
- 12) All student fundraising requests shall first be reviewed and approved by the Director of Student Life (or

designee) based on the following principles.

- a) The activity is of benefit to the campus community. The nature and location of the activity must also be appropriate for involvement by SOU students.
- b) The activity invites participation in a way that is non-coercive.
- c) The activity has been well planned and there is adequate assurance the group is risking only money that it is prepared to pay in case the activity is not successful.
- d) There will be adequate supervision of the activity to be responsible for cash handling, participant safety, and compliance with SOU standards.
- e) Activity should be for a defined and short period of time.

This policy may be revised at any time without notice. All revisions supersede prior policy and are effective immediately upon approval.

D. Policy Consultation

Director of Student Life; Director Inter Club Council; President ASSOU; Internal Auditor; Vice President for Development and Executive Director, SOU Foundation; Director of Service Center; Student Organization Event and Travel Support; Assistant Director of Student Life for Leadership. Policy was posted on February 7, 2018 for community comment.

E. Enforcement

1. All volunteer coaches, organization advisers, and Student Organization presidents are required to sign an acknowledgement of this policy. The signed copies will be kept by the Office of Student Life.
2. The Student Organization's failure to adhere to this policy will result in the loss of Resources, Resources use and/or recognition from the university.
3. Students, volunteers, and advisers who are individually at fault may be removed from their positions and/or referred to the Office of Student Support and Intervention for Student Code of Conduct violations. In the case of theft, all parties involved will be reported to the proper authorities.

The Policy Contact, defined above, will write and maintain the procedures related to this policy and these procedures will be made available within the Custodial Office.