VANDERBILT UNIVERSITY

START BASIC STUDENT LEADER TRAINING

SOLS

Office of Student Organizations, Leadership, and Service

DEANTE' SMITH
DIRECTOR

ADRIENNE WATSON
ASSISTANT DIRECTOR

WIL DE LOS SANTOS
PROGRAM MANAGER

MIKE RAHIMZADEH
PROGRAM COORDINATOR

CAROLINE WILSON
PROGRAM COORDINATOR

MADISON WOODS
PROGRAM COORDINATOR

CHARLIE ZIMMERMAN
GRADUATE ASSISTANT

OLIVIA CAMPBELL
GRADUATE ASSISTANT

LOCATED IN SARRATT 339 AND 343

STUDENT LEADER EXPECTATIONS

STUDENT LEADER EXPECTATIONS

Accountability

- WELLBEING – Student Org Leaders should prioritize and communicate needs early and often to avoid burnout. You are human first, students second, and then student leaders. Take the time that you need so that you show up as the best version of yourself!

- BE INFORMED – Learn from past mistakes. Identify all resources that you need early, READ, READ, READ relevant websites and the student handbook. Learn about all processes and procedures relating to student organizations. Attend as many trainings as possible.

- CONNECT – Meet with previous student officers and current ADVISERS early and often! Learn everything there is to know about your org. Learn as much as you can about your group activities. If you are an outgoing officer, EDUCATE! EDUCATE! EDUCATE! Make sure your new leaders learn everything they need to know.

- COMMUNICATE – Your team (including your Adviser) should know and understand your plans before they happen. Make sure that you meet, email and ensure understanding. Advisers should be included in every step of your activities. Not just when an issue that can't be fixed arises.

- RESPECT – Honor student org processes and procedures by following any given steps as instructed by the relative department and meeting deadlines. Ex: Returning the P-card in a timely manner by the same person that checked it out.

STUDENT LEADER EXPECTATIONS

Avoiding Pitfalls

- MISSED DEADLINES – Missed deadlines can lead to penalties (loss of P-card privileges, org being frozen). Make sure everyone involved follows given deadlines for completing forms or returning items as instructed.

- DISREGARDING – Organizations that do not follow policies and procedures can put their members and the University at risk and could lead to the group being inactive. We encourage innovative and creative events that are safe and responsible. Keep your Adviser in the loop early and often.

- NOT SHARING – Student Leaders need a plan to share information with each other. For instance, communication about Student Organization Fund should go to incoming treasurers from last year's applicants. Incoming and outgoing officers need to meet to discuss RSO Registration to accurately answer questions. Not sharing information delays your organization's needs being met and can create long-term issues.

- TOO MANY COOKS – Too many student leaders involved in a task can create confusion and blur the lines on responsibilities. Leaders can check in but should also trust the person assigned the task. If they need support, they should ask for assistance if necessary. This makes completing tasks much smoother.

- UNAUTHORIZED APPROVALS – Students should not sign any contract nor make any business approvals on behalf of their organization. Such activities could leave the students and the organization liable for meeting the vendor's needs.

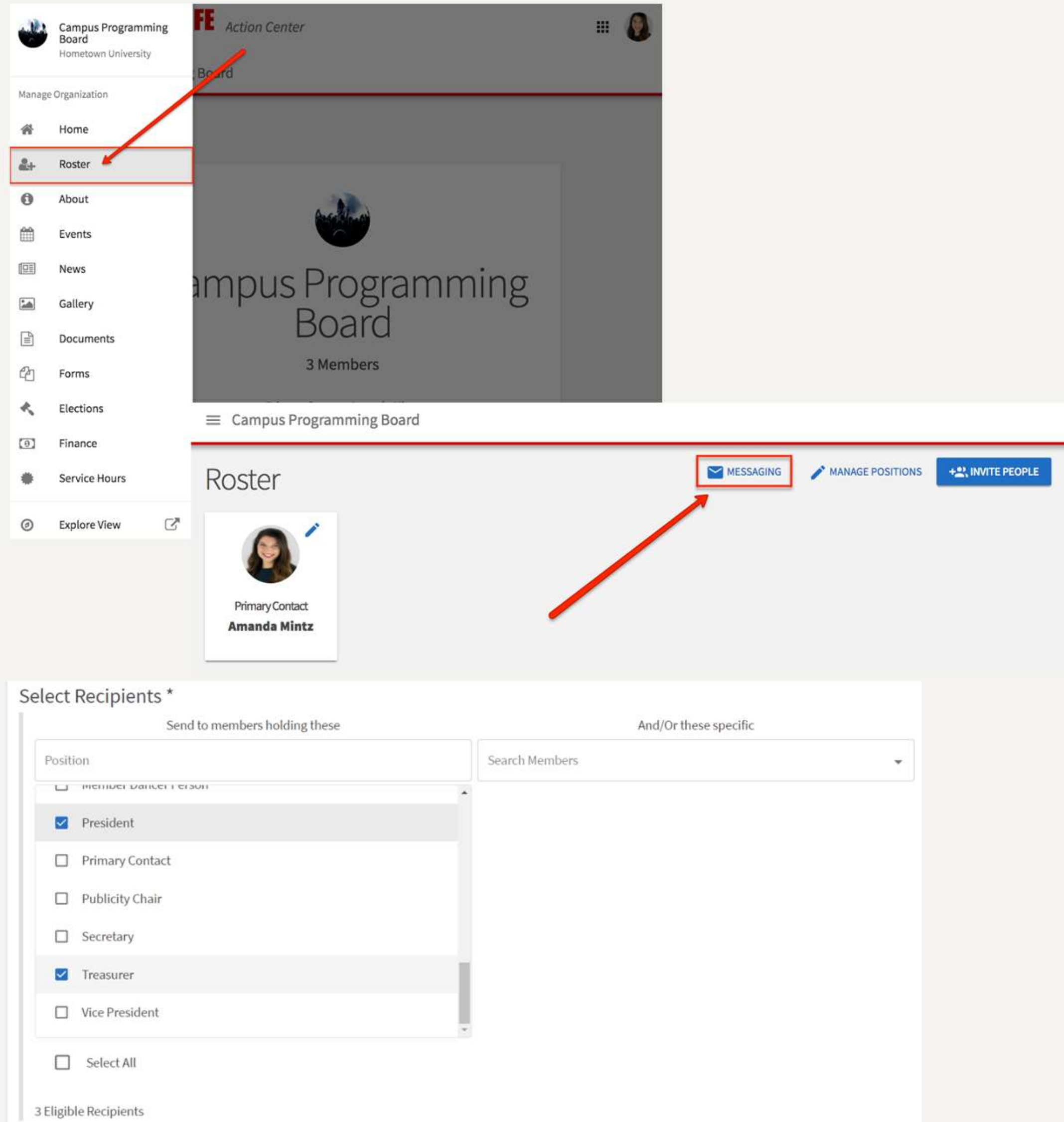
- OUTDATED ROSTERS – Student Groups need to keep their Anchor Link rosters up to date. Doing so ensures current student leaders have access to reserve space or keeps the student group POM compliant if working with minors.

Student Leader Expectations

Internal Communication

Relay Messaging

- From your organization's Action Center, head to *Roster* in the org tool drawer.
- Click on the Messaging link in the upper right corner, followed by Create Relay on the page that loads.
- Select the positions or individual members that you would like to send the message to by selecting Edit... within each component.
- Enter a title for your relay to identify it later (this does not carry over to your message). When you're finished, click Generate.
- On the new page, take the Temporary Relay Address (email address in blue text), open a new email in your preferred email account (e.g., Outlook), and add this into the "To" field. Then, just compose and send your message as normal!
- Remember that messages are sent within the system and then out to an e-mail address if the user has not opted out of receiving messages via e-mail in their notification settings.
- Visit the [messaging section](#) for more message options.



Student Leader Expectations

Preparing New Officers

Create Transition Documents

- Officer roles should be defined by the organization's constitution and kept up to date on its Anchor Link roster
- You may also have resources and records to pass down to incoming officers: meeting agendas, budgets, planning timelines, etc.
- Constitution must also outline membership removal procedure to ensure fairness of practice.

Connect with your Adviser

- Each administration will need to have a relationship with the organization's adviser. An introduction from the outgoing officer class is a helpful start.
- It's up to the organization leadership to find their own adviser. If you don't have someone willing to approve registration for the group, you won't be able to submit registration.

Allow Time for Training

- Officers need a chance to learn the ropes of their roles as well as the group's history.
- Officer terms of a calendar year (rather than a school year) are strongly recommended. This gives graduating seniors at least a semester to support the new officers and transmit institutional knowledge.

ADVISER EXPECTATIONS

Advising Reminders

- ❖ Students will be responsible for selecting their organization's **Adviser**;
- ❖ Advisers will now be responsible for helping student org leaders manage all aspects of their group;
- ❖ Advisers outside of Student Affairs at Vanderbilt will receive additional support from Student Affairs Liaisons (SAL Pals);
- ❖ Student Affairs Liaisons will be assigned to advisors based on their organization's category:
    - **Academic (academicorgcoach@vanderbilt.edu)**
    - **Arts/Programming (programmingorgcoach@vanderbilt.edu)**
    - **Cultural (culturalorgcoach@vanderbilt.edu)**
    - **Service (serviceorgcoach@vanderbilt.edu)**
    - **Special Interest (specialinterestorgcoach@vanderbilt.edu)**

Translation

- ❖ Student groups will no longer be assigned a student org coach. Students may choose to have their current coach serve as their Advisor. Meet with student leaders to clarify expectations of support;
- ❖ This will be reflected in Anchor Link after the RSO Registration period;
- ❖ Advisers will need to make sure that student groups follow policies and procedures highlighted in the handbook including **POM**. They will work with Student Affairs Administration to handle student org purchasing, travel, and to begin contracts;
- ❖ SOLS will communicate updates to student leaders and coaches prior to arrival.

ADVISER EXPECTATIONS

Adviser's Role

Adviser Role – To assist student org leaders and student groups with finding avenues for activity that is consistent with its mission, compliant with University policy, conducive to every participant's growth and development, and critical to building a sense of community.

Organization Advocate

- Help student organizations navigate Vanderbilt's structure to help fulfill their mission(s)
- Provide administrative guidance in planning programs and events
- Offer continuity from year to year
- Consult with Office of Student Organizations, Leadership and Service when necessary.
- Provide advisement as needed

Financial Authority

- Educate student leaders on appropriate finance practices
- Authorize financial transactions (check out card/p-card, travel, reimbursement etc.)
- Help determine org activity for the academic year
- Guiding officers in the maintenance of accurate records and bookkeeping.

Policy Compliance

- Educate on, Interpret and enforce University policy concerning student engagement
- Review and approve organization registration documents
- Help organizations review and update all governing documents
- Ensure compliance with Protection of Minors (POM) Policies.

Department Liaison

- Work closely with SOLS and Student Affairs central to ensure consistency and cohesion with all student engagement practices
- Raise awareness of unique organizational needs and issues
- Raise awareness of important student org dates (Student Involvement Fair, Community Service Fair).

ADVISER EXPECTATIONS

Mutual Understanding

- WELLBEING – Advisers should prioritize and communicate needs early and often to avoid burnout. They are human first, employees second, and then Advisers. Respect the time that they need so that they show up as their best selves! Establish a mutual understanding to ensure an optimal experience.

- BOUNDARIES – Establish expectations of each other early on so that everyone feels comfortable serving in their roles. Discuss communication, attending meetings, and anything that you and your Adviser are willing/unwilling or able/not able to do to support the organization. Once established, those boundaries must be respected. For instance, no late-night calls should be made to Advisers unless they agreed to receive late night calls.

- COMMUNICATE REGULARLY – Setting up time to go over organization plans will help you receive the support that you need and keep everyone on the same page. Advisers are a great administrative source. Whether through institutional knowledge, or access to helpful resources, they can help you meet your organization's needs or plan activities accordingly with timely communication.

- APPROVALS – Advisers will need information from your organization when approving a financial or programmatic request. Protocol requires that you provide the requested information in order to receive any approval for these activities.

RSO BRANDING GUIDELINES

Student Centers

VANDERBILT®

OUR TEAM

CLAYTON ARRINGTON

SENIOR DIRECTOR,
STUDENT ENGAGEMENT &
LEADERSHIP

ANGELA COVINGTON

ASSOCIATE DIRECTOR,
RESERVATIONS & SYSTEM
MANAGEMENT

JORDAN HAJACOS

ASSOCIATE DIRECTOR,
EVENTS

JONATHAN SPENCER

ASSOCIATE DIRECTOR,
PRODUCTION SERVICES

SARA COPE

ASSOCIATE DIRECTOR,
FACILITIES MANAGEMENT

Abi Enockson

Senior Coordinator of Events & Operations

Riley Munger

Senior Coordinator of Events & Operations

Karen Burnett

Senior Coordinator of Reservations & System Management

JT McLoughlin

Senior Coordinator of Production Services

Nick Brazelton

Coordinator of Operations
& Events
SLC|Alumni|Benton

Charlie Gray

Coordinator of Operations
& Events
Sarratt|Res Colleges|Black Box

Zach Greene

Coordinator of Operations
& Events
Sarratt|Res Colleges|CES

Anne Koehler

Coordinator of Operations
& Events
Commons|1101

Trey Grevious

Coordinator of Operations
& Events
SLC|Alumni|ESB

Brooklyn Barnes
Coordinator of Operations & Facilities

Dennis Shillingburg
Coordinator of West End Neighborhood & Greek Housing

Keysi Spahr
Coordinator of Operations & Facilities

Suzanne Freeman
Production Services Associate

Presley Hopper
Production Services Associate

Jaylin Mills 1/15
Production Services Associate

Brady Brown
Production Services Associate

PLANNING YOUR EVENT

PLANNING YOUR EVENT

1 EVENT DETAILS
- Name, Date, Time, Load In/Out time, Location
- Contact Information
- Who is attending?
- What are your event setup needs?

2 PRODUCTION SERVICES
- Do you need an onsite tech?
- Do you have audio needs? Do you have lighting needs? Do you have video needs?
- Who is speaking/performing?

3 BILLING INFORMATION
- Is there a fee to attend your event? If so, how will you sell tickets?
- How is your event funded?
- Have your billing information ready!

4 CO-SPONSORSHIP
- List any campus partners
- List any external partners

5 FOOD & BEVERAGES
- Will there be food? Will there be alcohol?
- How is the food being served? (buffet, box, food truck?)
- Who is your caterer?

6 ADDITIONAL VENDORS & SERVICES
- Do you need parking? Do you need VPD/security?
- What other vendors are you workign with for your event?

7 MISCELLANEOUS
- What additional information can you provide about your event?

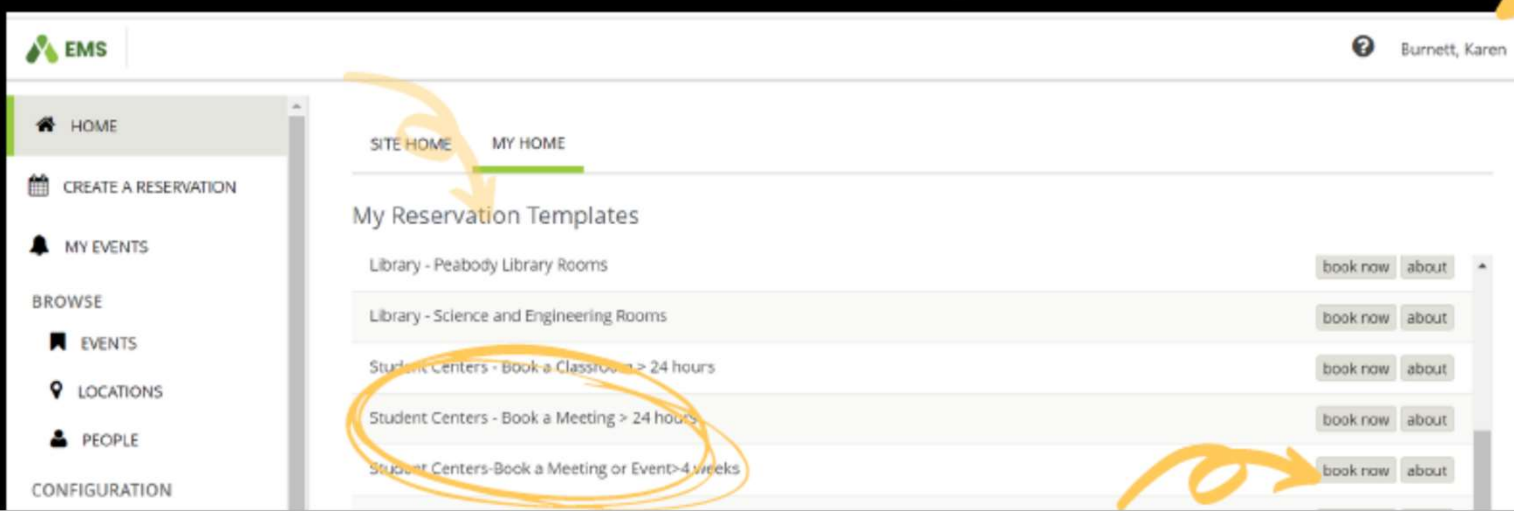
Student Centers
VANDERBILT

REQUEST SPACE FOR YOUR EVENT

EMS and Anchor Link communicate to provide you access to book for your groups. To ensure you can book space for your student organization, you must be listed as an officer in Anchor Link. For your department, the Student Centers team can provide you access. To book space visit vu.edu/reservespace

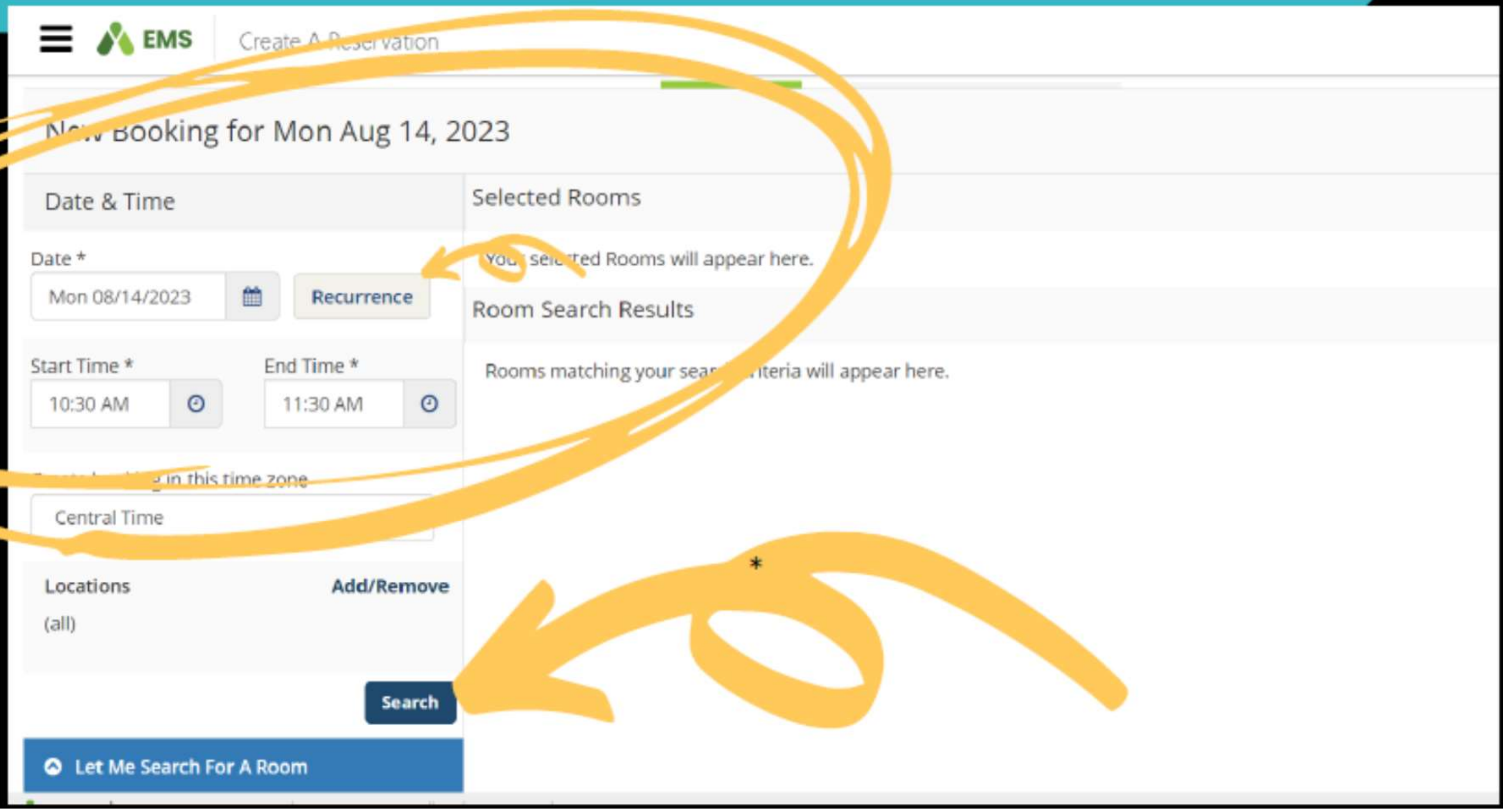
(Chrome users be sure to follow the information listed to access via Incognito)

The login is located in the upper right corner, use your VUnetID and password. Under "My Home", select the appropriate reservation template by using the "book now" button on the right side.



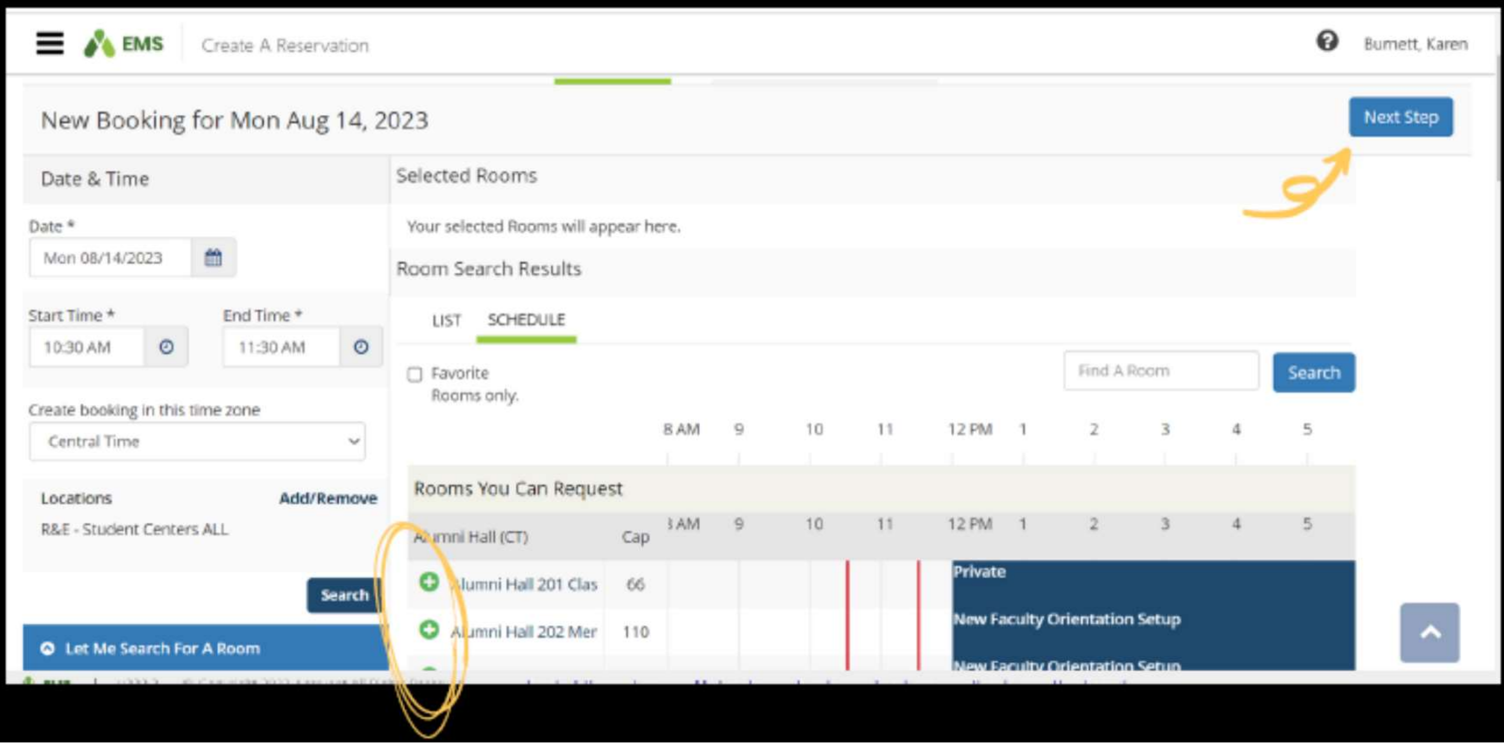
On the left side, enter your date/time

- select Recurrence if this is a weekly, monthly meeting you are looking to schedule - there is even a random options of the dates are varied. Only thing is the times must be the same for all events.
- You can change the location to your specific location or view all available spaces that fit your entered criteria.
- select Search

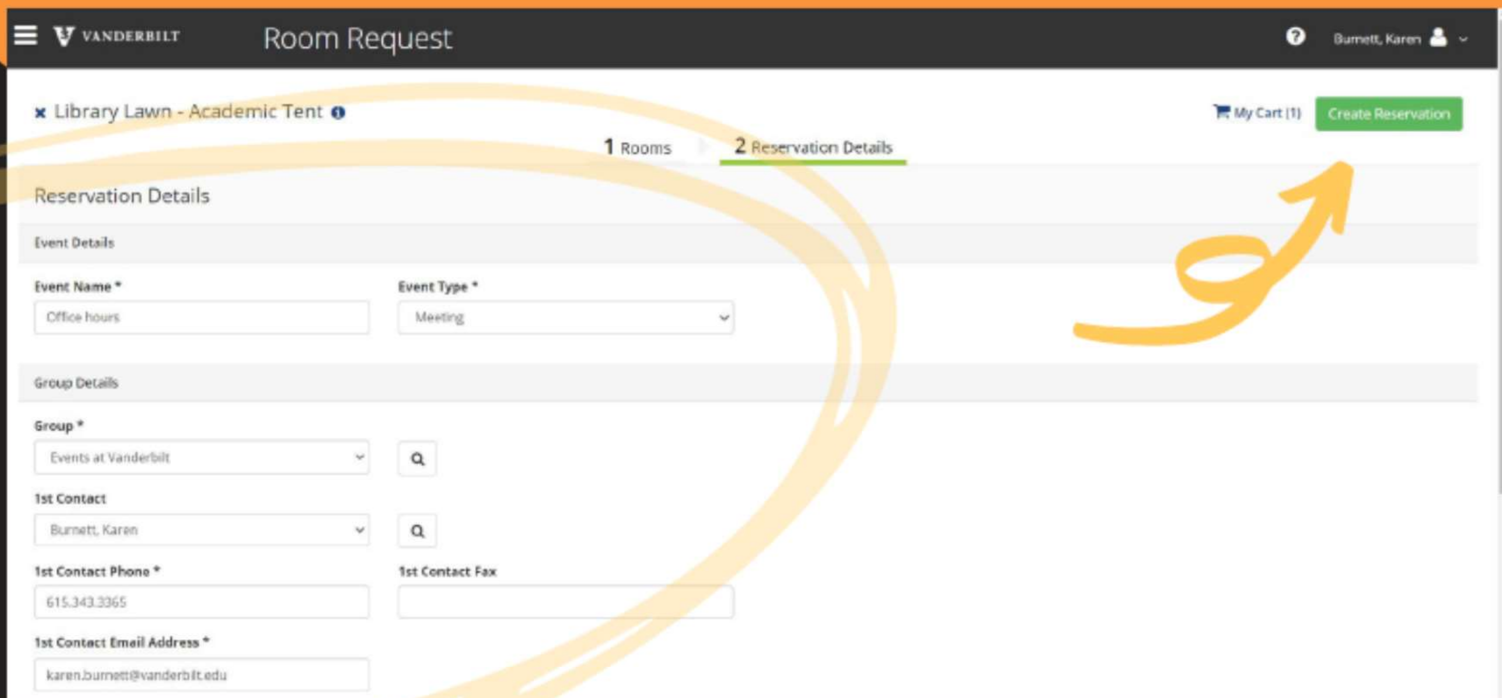


All locations associated with the template you selected to search will populate

- You will see what time other events are booked before or after your scheduled time.
- The capacity is listed to the right of the room name.
- If there isn't a plus sign, the room is not available due to existing bookings, request is before/after building hours, etc.
- Use the green plus to select the room, then the blue "Next Steps" button in the upper right corner.



Complete the remaining department details and select "Create Reservation"and you are all set!



If you need to make edits in the future, just select "My Events" when you log in next time and you'll see a listing of all events. You can make edits, cancel, etc.

NEXT STEPS

EVENT REQUEST WORKFLOW

1

Request event space - EMS

- Use online EMS reservation application
- Submit your request a minimum of 4 weeks in advance.

Submit event to Anchorlink

- Submit a minimum of 4 weeks prior to the event to allow time for approvals

2

3

Meet with Student Centers

- Confirm Vendor needs
- Confirm layout
- Attend FRC meeting if needed

Enjoy your Event!

- Book again for next year

4

Student Centers
VANDERBILT

WEST END NEIGHBORHOOD SOCIAL EVENT WORKFLOW

1

Request event space - EMS

- Use online EMS reservation application
- Submit your request a minimum of 4 weeks in advance.

2

Submit event to Anchorlink

- Submit a minimum of 4 weeks prior to the event
- Fill out the Social Event form
- List 6 event hosts
- Select if alcohol will be present

3

Event with Alcohol

- Complete Host Responsibility Training
- Provide food and non alcoholic beverages

4

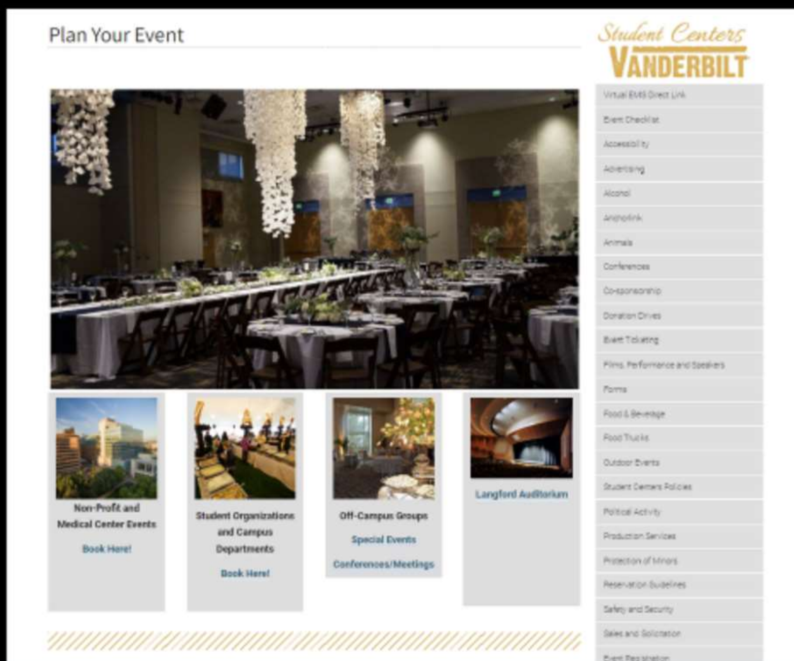
Attend WEN Meeting

- Meeting occurs 30 mins before start time

Student Centers
VANDERBILT

RESOURCES

WWW.VANDERBILT.EDU/STUDENTCENTERS/EVENTS/PLAN-YOUR-EVENT/



FOOD TRUCKS

TICKETING

OUTDOOR EVENTS

PARKING

VIRTUAL LINK

STUDENT ORGANIZATION & CONTINGENCY FUNDING

Student Organization Fund Group Structure

- Student Organization Funding (SOF): funding that is distributed annually to Registered Student Organizations (RSO) that submit budget requests.
- Comes from a Student Services Fee **paid by students.**
- Undergrad – Student Committee appointed by VSG reviews all undergrad SOF applications. The Chair/Co-Chair oversee the entire process and contingency fund process during the school year. They elect a group of students (sub-committee) to assist in reviewing the SOF application.
- Graduate – Graduate Student Council reviews the applications and suggest allocation amounts for SOF.

STUDENT ORGANIZATION FUND

- Funding provided to RSOs that complete annual Student Organization Fund application during each spring application period
- Allocated to student organization's account for their activities throughout the academic year
- Applications are reviewed and recommendations are made by student-led Student Organization Fund Committee. Final allocations are determined by Dean of Students.
- Groups are required to keep records of event expenditures in order to apply for SOF (includes tracking attendance through Anchor Link)
- Application Process
  - Application Process via Anchor Link
  - Interviews
  - Allocation Decisions

CONTINGENCY FUND

- RSOs may request any time during the academic year
- Useful for new RSOs that missed the Student Organization Fund application period because of late acceptance
- Useful for current and new programming that require funding beyond the Student Organization Funds allotted
- Other funding shortfalls evaluated by Student Organization Funding Committee on a Case-by-case basis
- Application Process
  - Form to be completed in Student Organization Fund Committee Anchor Link page

Student Organization Fund Restrictions

SOF Funding may not be used for the following:

- ❖ Requests to purchasing or supply alcohol or tobacco to students;
- ❖ Requests to pay student leaders or members of the organization for services rendered;
- ❖ Requests for programs which exclude participation or membership to segments of the Vanderbilt population, or where certain groups of students are not fully included in the event;
- ❖ Requests to fund charitable donations or expenses intended to directly and solely benefit non-Vanderbilt students or agencies;
- ❖ Requests for funding to directly maintain or establish a reserve. As of this year, unused funding does not roll over from one year to the next.
- ❖ Requests to fund expenses which serve to sustain and/or benefit only the membership of the petitioning organization (i.e. private parties, T-shirts, etc);
- ❖ Requests to fund travel, unless it is core to the mission of the organization;
- ❖ Questions regarding the Student Organization Fund should be addressed to **studentservicesfee@vanderbilt.edu**
- ❖ Visit webpage for more details: **https://www.vanderbilt.edu/studentorgs/finances/studentservicesfee/**

Student Organization Fund(Contingency Funds)

- Application opened **August 23**;
- Students need to complete application at least 2 weeks before the money is needed (but not more than a month early);
- Student chair is expected to respond to the request within 72 business hours, notifying that it was received;
- 5-10 minute Zoom meeting will be scheduled to discuss the request;
- Approval/denial will be sent in an email format;
- If approved, a template will be provided that includes event/program name for which the funds are to be used, description of what the funds are to be used to cover, amount of money provided, and SOF task number to charge.

Student Organization Fund Process

January	• Communication of SOF Application
February-March	• SOF Application Period
April	• Application Review Period
May	• Notification of Allocation
	• Appeal Period

Restrictions on the increased amount of a request will be communicated this semester. More information to come.

FINANCES

Our Administrative Coordinators on the Finance Team want to meet you and your adviser to talk about purchasing, travel, and contracts!

Val Lorusso
Sarratt 310 (in-office M-W-Th)

Fun Fact: I'm an 80's and Classic Rock enthusiast, love the Chicago Cubs, and cooking for and with my family.

Ally Rouff
Sarratt 310 (in-office M-T-W)

Fun Fact: I grew up on Long Island, NY and moved to Nashville in 2018. I love live music and trying new foods/restaurants in Nashville and on my travels.

Katie Muir
Sarratt 310 (in-office W-Th-F)

Fun Fact: I am one of those rare Nashville natives! I change the color of my hair on the regular, and I love all things pop culture: movies, music, fashion, and history.

Student Affairs Finance is here if you have any questions or complex situations. We can help navigate the policies. Please reach out to us.

Mark Leners,
Accountant

Greg Swanson,
Admin Officer

Financial Unit Manager for Student Orgs

Dawn Midyett,
Admin Manager

Eda Shorette
Sr. Business Operations Analyst

Kaitlyn Garrett
Sr. Administrative Officer

ORACLE CLOUD

- **<u>Oracle Cloud</u>** – The Vanderbilt accounting system used to make purchases, pay vendors and process reimbursements
- You can find more information here: https://www.vanderbilt.edu/skyvu/

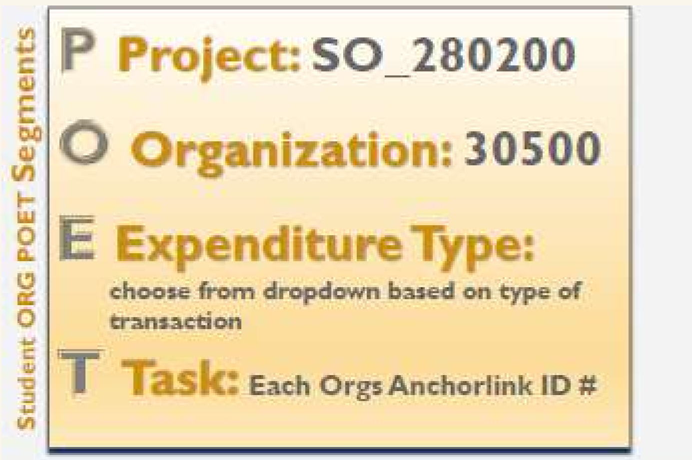
KEY FINANCE TERMS

- **COA/POET String** – The organization's financial information needed for expenses and space reservations.
- **Task Number** – The unique RSO identifier, a part of the POET information. This number can be found in Anchor Link. RSOs spending funds need a task number. New RSOs must complete a Task Number Creation Form.
- **Student Org Purchase Request** – The process by which student groups request assistance with any type of purchase.

The Marketplace – An online platform that allows registered student organizations to post fees/dues and sell merchandise to members of the Vanderbilt community. The platform is ideal for student organizations to charge member dues, collect trip fees or sell their latest t-shirt or other merchandise. To have posts made on behalf of your organizations, please complete the Marketplace Anchor Link Form. Any questions regarding the marketplace may be directed to sarratt@vanderbilt.edu.

TO CHARGE A STUDENT ORG:

- Student organizations are set up as a project, and a POET string will be used

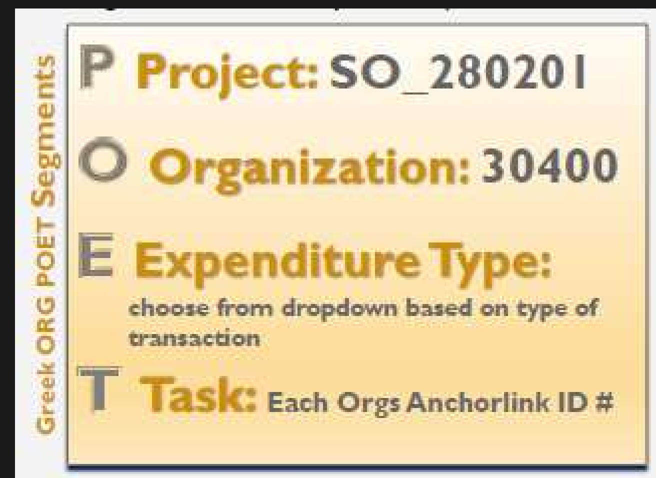


COA for Student Orgs:

300.10.30500.xxxx.071.000

TO CHARGE A GREEK ORG:

- Greek Organizations are set up as a Project, and a POET string will be used



COA for Greek Orgs:

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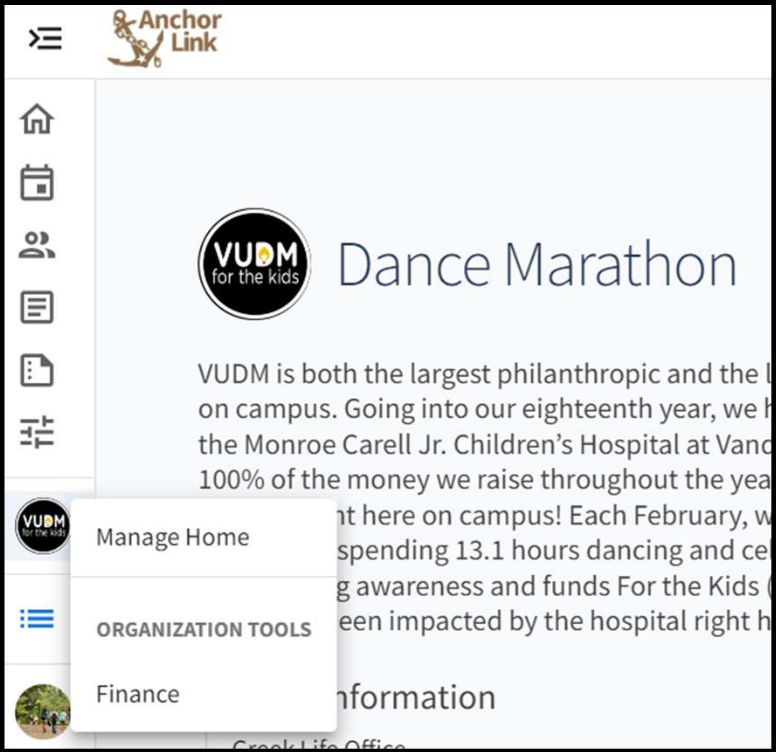
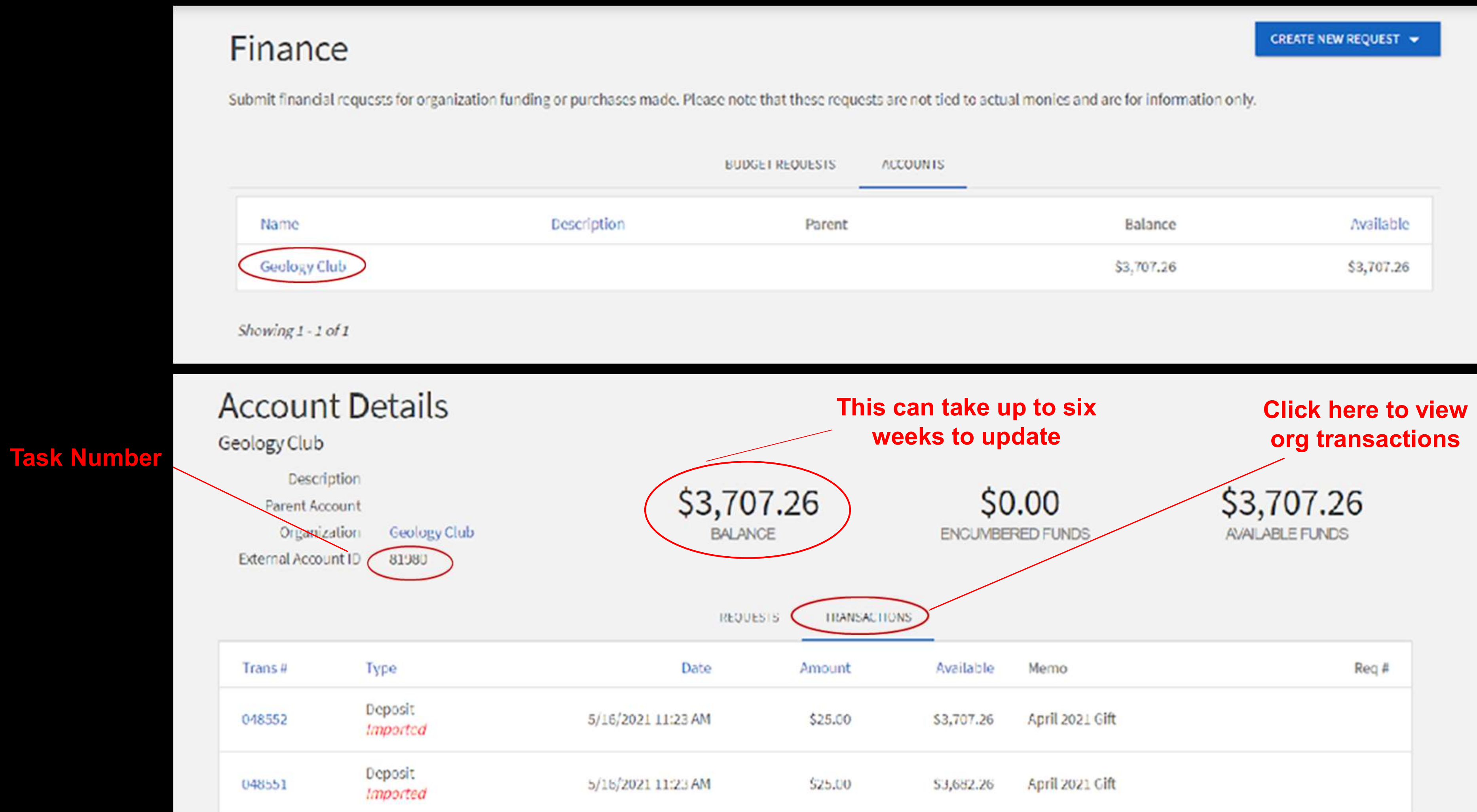
VIEWING ORG FINANCES IN ANCHOR LINK



VIEWING ORG FINANCES IN ANCHOR LINK



ANCHORLINK

AnchorLink Uploads:

- Transactions in Oracle are downloaded once a week and uploaded to AnchorLink.
    - Transactions can take up to six weeks to show up on Anchorlink.
- Gifts and other funds deposited will take over a month to be reflected in AnchorLink.
- Ensure your organization's information is updated (leadership team, etc.).

FUNDS FOR ORGS

- RSO’s may collect money through fundraisers, dues, ticket sales, selling items or similar activities.
- The marketplace is the best place to post dues, items for sale or other revenue collection. This is a PCI compliant platform that allows students to use the Commodore Card or personal Credit Cards.
  - Square/Venmo/etc. – cannot be used

HOW TO DEPOSIT FUNDS

- Funds collected should be deposited as soon as possible. The funds should not be kept in your personal possession.
- Deposits should be made in Sarratt 310.
  - Cash deposits must be counted with student present.
- Email RSO’s deposit information to Mark Leners (mark.leners@vanderbilt.edu)
  - Include:
    - Name of Organization
    - Task number or COA string
    - Amount of deposit
    - How the revenue was earned
    - Your name and best way to contact you
    - Date of deposit

STUDENT REIMBURSEMENTS

- Reimbursement must be submitted by the person who made the payment. Request for reimbursement for another person is not allowed.
- If you do not have access to the Oracle Expenses Module, please reach out to Mark Leners.
- Reimbursements should be submitted within 30 days.
- A staff member will review the Request for Reimbursement and approve or return for more information. If returned, please look for comments with corrections needed for the report outlined in the email generated from Oracle.

Video created to assist students through this process:

Student Reimbursement Video

For additional support, please visit us in Sarratt 310 on Wednesdays between 8am-4pm.

March 18, 2024

VANDERBILT UNIVERSITY

PURCHASING AND TRAVEL

Everyone’s favorite subjects!

PURCHASING

Advice for Purchasing:

- Confirm funds are available before submitting your Purchase Request in Anchor Link

- Review purchases
  - Are you allowing enough shipping time when ordering from boutique sites (Etsy)?
  - Are you aware we have Amazon business accounts and not Amazon Prime, so shipping will take longer?
  - If you're using a spreadsheet, is it well organized with links that go to the correct location?

- Make sure you create a PDF of your email thread showing the full correspondence of your Adviser's approval.

- Gifts to speakers and committee members should be uniform.
  - VU branded merch
  - Everyone receives the same item

- **Complete the Purchase Request Form 2-4 weeks before you need the items or payment to vendors.**
  - Requests submitted with less than 2-4 weeks' notice may be delayed in payment processing.

Purchasing

- **All purchase requests MUST be approved via email by your Student Organization Adviser**. You will be required to attach the entire email thread to your Purchase Request form as a PDF.
- **How to make a purchase:**
  - **Complete the** Purchase Request Form in Anchor Link.
  - In-person (P-Card) – Should be reserved at least **two weeks** in advance for pick up in Sarratt 310. For local, in-person purchases only and not online purchases.
  - Online (One Card) – Should be completed **two weeks** in advance. We recommend using common websites such as Amazon, Target, etc. (please note delivery and service charges). Specialty items ordered through boutique sites are difficult to receive in a timely manner and may not acknowledge our tax-exempt status.
  - Merchandise and Apparel – Should be approved four weeks in advance through the Brand Engagement Office. Student must work with approved or licensed vendors only.
  - Payment to Service Providers - May be requested by completing the Purchase Request form two weeks in advance. New suppliers **must apply to become a vendor/supplier and** will receive an email with instructions on how to register as a supplier at Vanderbilt.
- With pre-approval from your organization's Adviser, you can submit an expense for reimbursement in Oracle. This applies to purchases that are made with personal funds. Reimbursements should be submitted in the same month purchases occurred.

Supplier Registration

- All suppliers/vendors need to complete registration **prior** to providing services. This needs to be done through the supplier registration portal at http://vu.edu/newsupplier.
  - Registration takes time to complete, and the supplier will be required to submit several details about their company. Suppliers will be able to review the registration instructions, gather necessary documents, and begin the registration process.
- After completing and submitting the online registration, the supplier's request will go through an approval process. Once approved, they will be registered with Vanderbilt University as a supplier.
  - Step-by-step instructions can be found: https://finance.vanderbilt.edu/purchasingandpaymentservices/purchasingservices/documents/Supplier_Self_Registration_Guide.pdf
- Once registered, the supplier will need to submit a detailed invoice which must include the following:
  - Supplier name and address
  - Reference to Vanderbilt University
  - Invoice date
  - Unique invoice number
  - Description of the goods and/or services provided
- The invoice will need to be submitted by the student using the Purchase Request form.

Requesting Adviser's Approval

Send an email to your Adviser and include the following information:

- Organization
- Organization's Task Number
- Reason for Purchase
- Vendor Name(s)
- Estimated Cost
- Student Services Fee Funds Provided
- Funds Available in Org Account (How to check for funds)
- Form of Payment Requested
  - In person (P-Card to be Checked Out)
  - Online Purchase
  - Merchandise and apparel order (Purchase Requisition for University approved supplier)
  - Reimbursement for items purchased
- Requested Date to Check Out P-Card or receive purchased items:
- If traveling outside of the Greater Nashville area, provide dates, location, and persons traveling (Travel Policy)

Ordering Merchandise and Apparel

Merchandise includes clothing, stickers, trophies, pens/highlighters, cups, etc.

1. Get an itemized quote from one of our licensed vendors (list available on the Brand Engagement website)
2. Secure your adviser's approval via email and save it as a PDF.
3. Complete the Merchandise Order Request (MOR) Form **at least four weeks in advance.**
4. Complete the Purchase Request Form and attach the email from Brand Engagement showing your MOR was approved.

All merchandise must be ordered from a licensed vendor and paid via Purchase Order.

Merchandise & Apparel (Cont.)

After deciding what is to be printed, please provide the following information to the licensed vendor so they can provide you with a proper quote:

- Department/Organization name
- Contact information
- When you need the product (deadline)
- Budget
- What products you're interested in
- Provide information on what you want on the product (artwork, if possible)
- Indicate use of the product:
  - Internal Use/Promotional Giveaways
  - Purchase for Resale (Requires prior approval from Adviser)

Prizes/Gifts

Purchases must be made by a Vanderbilt Employee using a OneCard. **Students may not** purchase gifts, prizes, or gift cards. **Students will NOT be eligible for reimbursement**.

Cash prizes or gift cards are not allowed.

Prizes and Gifts (tangible gifts – not gift cards):
Gifts and Prizes: defined as items given to select individuals; items given to all attendees/members with a value under $75 are not considered gifts. The gift total value includes all items within the gift to one person at one time (IE: Gift Baskets)

- **Tangible Gifts Under $75**

  Required for purchase:

  - Approval of the group's Adviser
  - Explanation for purchase of gifts
  - List of recipients receiving gifts
  - Adviser approval email

Prizes/Gifts

Gift Cards:

- The purchase of Gift Cards or Gift Certificates is **highly discouraged**.
- **Preapproval is required** for the purchase of all Gift Cards or Gift Certificates regardless of value from Student Affairs Finance and Payment Card Office.
  - Cash Advance Gift Card Request Form
  - Cash Advance Gift Card Tax Tracking Form
- Approved purchases must be made by a Vanderbilt Employee using a OneCard.

Students may not purchase gifts, prizes, gift certificates or gift cards with personal funds.
They will not be eligible for reimbursement.

DONATING TO NON-PROFIT ORGANIZATIONS

- Complete the Charitable Contribution Form.
- Adviser signs, then the org emails it to Mindy.Ireland@Vanderbilt.edu
- After all signatures are attached, the form is returned to the org or Adviser.
- Student submits the form to StuOrgPurchases@vanderbilt.edu for processing.
- Charitable org may need to create a supplier/vendor account if one doesn't already exist.

You may not use Student Organization Funding to donate to charity.

Raised funds may be used for charitable donations.

Agreements & Contracts

- Best practice: Allow 6 weeks of lead time for contract review and vendor set-up.
- Students and staff are not allowed to sign on behalf of the University or your student organization.
- Forward to Mindy.Ireland@vanderbilt.edu for Dean Black's review and signature.
- After it's returned, you will forward it to PurchasingServices@vanderbilt.edu.
- After all signatures have been collected the contract/agreement will be returned to you. It can then be submitted to StuOrgPurchases@vanderbilt.edu.
- New vendors/suppliers will need to be set up in Oracle *before* the work is completed.
- Speakers and performing artist – Fees paid should be all-inclusive of travel and hotel and noted in contract/agreement. They should book their own travel and accommodations at their own expense.

Student Org Travel

TRAVEL - WHERE TO START?

Group Travel

- Start planning now for groups of 10+ students.
- Orgs benefit from a group contract
  - lower prices
  - increased flexibility
  - Can only be used if travel is requested **far in advance** (4-8 weeks)
- Student names can be provided closer to the travel date.

<u>All airfare must be purchased through VU and our travel agent.</u>

<u>Airfare purchased outside of the process will not be eligible for reimbursement.</u>

Keep in mind busy times of the year for travel (Fall and Spring Break).

Questions: StudentOrgTravel@vanderbilt.edu

TRAVEL - WHERE TO START?

Domestic Travel

1. Complete the Intent to Travel Worksheet and ask your Adviser to review.
2. Complete the Domestic Risk Management Packet.
3. Complete the Student Org Travel Form.
4. **Make sure there's enough time for planning the trip.**
    a) Domestic travel - allow 4-6 weeks for travel arrangements to be made
    b) Local Metro-Nashville travel – allow 2-4 weeks for the completion of the driver authorization process and/or the reservation of ground transportation
5. If driving for service work, you're required to complete the Driver Authorization process. Your organization's primary point of contact should send one email containing everyone's proof of authorization to the Student Org Travel email and the Admin Coordinator who booked your travel prior to the trip.

Questions: StudentOrgTravel@vanderbilt.edu

International Travel

1. **Complete the [Intent to Travel Worksheet] and ask your adviser to review.**
2. **Contact the [Office of Global Safety] to complete the required steps for international travel.**
   a) Safety and Security Checklist
   b) Travel Risk Assessment
3. **Complete the [Student Org Travel Form.]**
4. **Make sure there's enough time for planning.**
   - **3 months in advance for international travel**

Our travel agent recommends we start planning *now* for all international trips!

Lyft Codes

Student Orgs can choose to use funds for Lyft rides. Advisors can create codes in Lyft for those rides.

VANDERBILT UNIVERSITY

STUDENT ORGANIZATION POLICIES & RESOURCES

STUDENT ORGANIZATION REGISTRATION

- Required for groups to become or remain a **Registered Student Organization (RSO)**
- Requires incoming student leader's admin access to org's Anchor Link page
- Requires **4** Officers, their emails, VUNetIDs, and cell phone numbers
- Also requires an Adviser (graduate/professional groups)
- Enables RSOs to register for Student Organization Funds and Contingency Funding
- Updates org roster and constitution – Grants **current** E-board ability to reserve space via Virtual EMS provided that Anchor Link roster is current
- Advisers review and pre-approve org registration and SOLS final approves
- **Deadline to complete registration for Fall 23' – Sept 15th at 11:59pm. Failure to complete by deadline will result in organization being frozen for the academic year**
- **If appeal is desired, the org will need to complete a form and then meet with Student Appeals Committee who will make the final decision.**

STUDENT HANDBOOK

- The Student Handbook covers a broad range of policies and procedures relating to Student Organization Activities. The SOLS Website contains links to specific topics in the handbook.
- All students and administrators should review it and ask questions as needed. Asking questions leads to processing and can result in policy updates that benefits student leaders.
- Knowing which practices to implement beforehand will make it easier for student leaders to carryout student org activities.

PROTECTION OF MINORS (POM)

- **Training Before Events**
  All members of your roster must complete the online POM training (Protection of Minors 101, Protecting Youth module, or Protection of Minors Annual Renewal) on or after July 1 of the current academic year. The self-paced training is available in Oracle Learning. **All groups working with minors must complete compliance requirements by Feb 12th.**

- **Failure to meet compliance by deadline will result in organization being frozen.**

- **Supervision At Events**
  - Level 1: Staff from a third-party organization or parents/guardians will be present for the entire event
  - Level 2: If there is no outside party present, all members of your roster must complete and pass a background check

- **Anchor Link Requirement**
  - Event registered
  - Paperwork submitted
  - Attendance tracked

- Visit our website for more information

Resources

- **University Counseling Center**: Call 615-322-2571 to speak with an on-call behavioral health provider.
- **Student Care Coordination**: Schedule an appointment online or call 615-343-WELL (9355).
- **Center for Student Wellbeing**: Call 615-322-0480.
- **Center for Spiritual and Religious Life**: Call 615-322-2457.

Resources
(Cont’d)

- SOLS Website
- Anchor Link Resources
- Student Handbook | Student Engagement Section
- Student Organization Fund | VSG Description of SOF
- Plan Your Event
- Organization Best Practices
- Student Discrimination

Reporting Resources

- Reporting an Incident
- Protection of Minors Reporting – Child Abuse and Other Child Safety Concerns
- Reporting Sexual Harassment or Sexual Misconduct
- Reporting Discrimination
- Report Hazing
- Report Honor Code Violation
- Reporting General Violations of University Policy (No including Sexual Misconduct, Discrimination, and Honor Code Violations)