WELCOME TO RSO TRAINING!

PLEASE CHECK IN!

RSO Training Check In

REGISTERED STUDENT ORGANIZATION TRAINING

FALL 2024

TODAY'S AGENDA

- Introductions
- ENGAGE: Goucher Platform Overview
- Finance & Budget
- Event Management Process
- RSO Handbook
- General Questions

WHO WE ARE

Erica Gardner

- Director of Student Events
- Office Hours (OSE):
  - By appointment for event management inquiries

Lucy Hendricks

- SGA Director of Student Organizations
- Office Hours (OSE):
  - M: 1:00-3:30
  - W: 10:30- 12
  - TuTh: 10:00- 1:30

Charlie Schaefer-Canner

- SGA Treasurer
- Office hours (OSE):
  - MWF: 10:30-12:00, 1:00-2:30
  - TuTh: 2:00-4:00

SGA EXECUTIVE BOARD & CABINET

Dr. Katherine Carnell
Advisor

Emma Kistner
President

Christian Houck
Vice President

Kerim Ouedraogo
Vice President Chief of Staff

Laney Dorr
Chief of Staff

Charlie Schaefer-Canner
Treasurer

Abdul Siam
Attorney General

Maya Castro
Director of Communications and Marketing

Liz Hannaford
Director of Academic Affairs

Olivia Reichardt
Director of Special Events and Procurement

John Dixon
Director of Student Affairs

Lucy Hendricks
Director of Registered Student Organizations

Carter Hinton-Ayodele
Director of Equity & Inclusion

ENGAGE: GOUCHER

modern campus

involve™

Branded Web Portal

With Involve, students only need to ask "where can I find ...?" once. The answer is always your institution's one-stop-shop digital engagement hub—powered by Involve, customized by you. Students can find groups to join, events to sync with their calendars, and digital forms to submit. They'll go from uninvolved to engaged in minutes.

Mobile App

Students hold the keys to engagement in their pockets. Our mobile app is customized to each institution and has all the goodies of the web portal, available in any Apple or Android smartphone or tablet.

Unified Events Hub

Invite students to sort through their options with filters, tags and categories. Add photos and videos to make any event page pop. Encourage attendance by allowing students to contact the hosts or sync the event to their personal calendars in a single click.

Roster Maintenance

Say goodbye to rosters full of students who graduated two years ago! Involve empowers student leaders to easily and reliably chronicle officer positions, advisors and membership. They can also define roles, invite new members, approve incoming applications and more.

Clubs & Org Directory

Generate a real-time listing of all active clubs, teams, organizations and departments—all searchable and filterable by tags and categories to make it easy for students to find opportunities that fit their interests. Store descriptions, meeting times and locations, upcoming events, public and private files, reflection forms and more. Invite students to join groups or contact officers with the click of a button.

Digital File Libraries

Stop your printers! Bring all files and forms online, associated with the relevant clubs and organizations, to improve continuity year after year. Student officers can upload documents for their organizations and set visibility—private, or public and downloadable—on their portal page.

On-Demand Virtual Events

Make your web portal like Netflix of Hulu, with every past virtual event available for download at any time in an on-demand library. Students can browse and stream programming at their own convenience, and you can attach reflection forms to assess and measure learning.

Social Media Integration

Don't compete; integrate. Connect social networks with embedded Facebook and Twitter feeds on the dashboard. Pull accounts for individual student groups and institutional offices into their portal pages.

DOWNLOAD THE APP TODAY!

NEED SUPPORT?

https://involve-support.moderncampus.com/hc/en-us

FINANCE & BUDGET

NEW BUDGET VOCABULARY

Allocation

- AKA Budget Request
- RSO requesting that a certain amount of money should be set aside for them for the entire academic year

Expenditure

- AKA Payment Request
- RSO requesting to purchase items for an event

Reconciliation

- New step in the process
- After a purchase has been made, turn in the receipts so the correct amount can be subtracted from an RSO's allocation

ALLOCATION

- An allocation request is a request for funding for the academic year
  - i.e. allocation requests made in Fall ‘24 will count for Fall ‘24 and Spring ‘25
- **The maximum amount an RSO can request is $2,600**
- The allocation request must be approved by the SGA Senate
  - SGA Senate meets Wednesdays at 7:30
- Allocation requests are an outline of the budget for your RSO for the year
  - Allocation requests should be broken down into categories i.e. food, travel, decorations, etc.
- Allocation requests must be submitted via the form in ENGAGE: Goucher

- An allocation request being approved by the Senate **DOES NOT** mean that an RSO can start spending the money they requested whenever they want
- The allocation request being approved by the Senate simply means that SGA is agreeing to set aside the amount requested by the RSO for the academic year for the RSO
- It does not mean that SGA is giving the RSO a blank check

EXPENDITURE

- An expenditure request is a request to spend the money allocated for an RSO via a previous allocation request
- Expenditure requests must be approved by:
  - The SGA Senate and the Ways and Means Committee if the amount is greater than $250
  - The SGA Treasurer if the amount is less than $250
- **SGA requires 2 weeks notice for expenditure requests**
  - i.e. RSOs should be submitting expenditure requests 2 weeks or more before the date that they need the items by
  - 4 weeks for hiring outside contracts
- Expenditure requests must be submitted via the form in ENGAGE: Goucher

- Examples of purchases that need expenditure requests:
  - Amazon purchases
  - Pick-up orders
    - E.g. Safeway, Walmart, etc.
  - Reimbursements
  - Hiring outside groups
  - Ordering catering
  - Ordering Custom T-Shirts
  - ANY PURCHASE THAT AN RSO WANTS TO MAKE
- Estimating the amount for an expenditure request is OK
  - SGA would rather an RSO ask for more, and need less, than ask for less, and need more

REIMBURSEMENTS

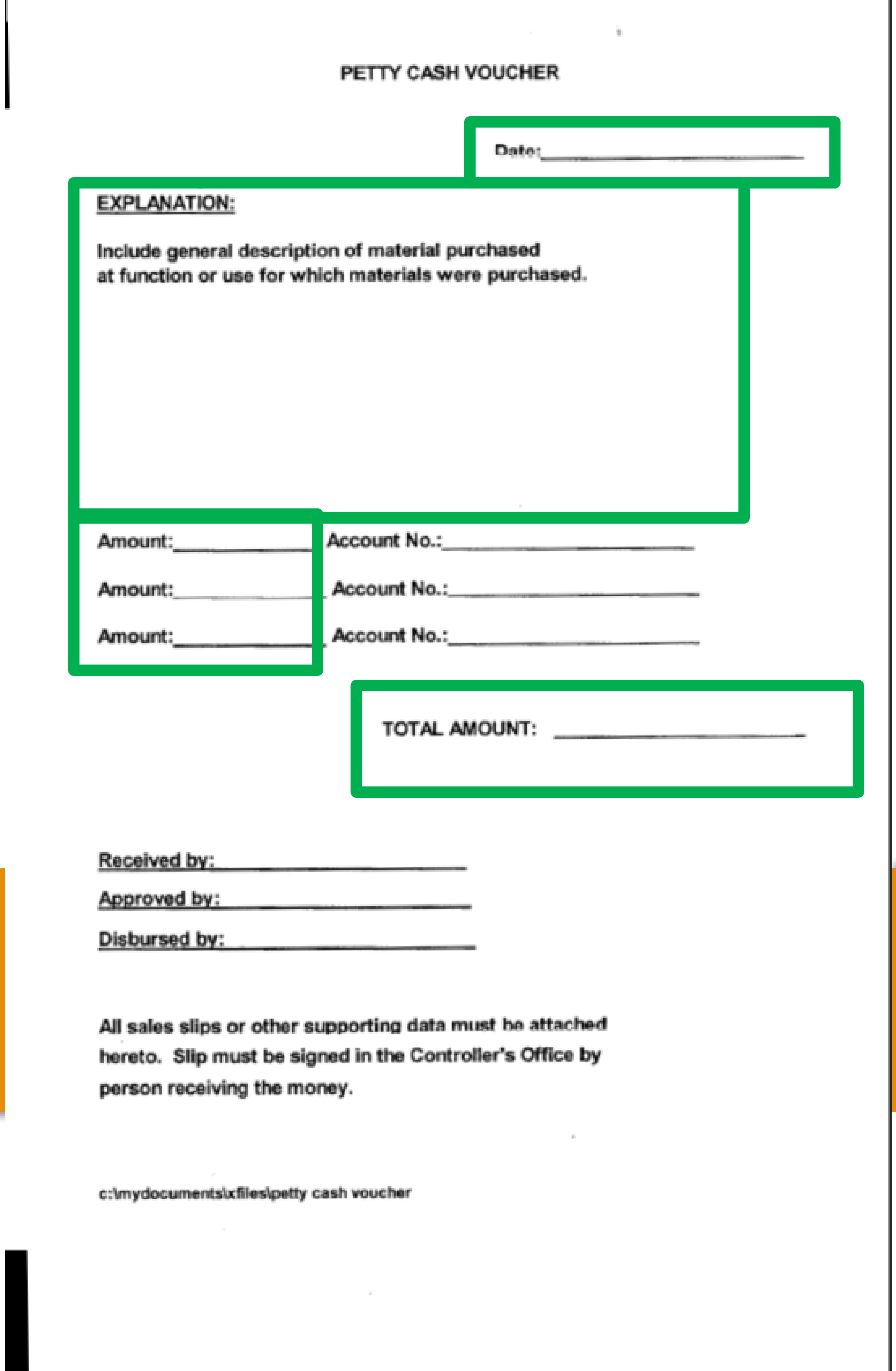
MUST BE APPROVED

BEFORE RSO MEMBERS MAKE PURCHASES

RECONCILIATION

- Reconciliation is a new step in the financial process for RSOs
- After a purchase is made for an RSO, the receipt for that purchase must be put into the Reconciliation form in ENGAGE: Goucher
- Most of the time, it will be SGA who puts the receipt in on behalf of the RSO, as SGA will be making most of the purchases via credit card
- **For reimbursements**, the RSO will need to submit the reconciliation form with their receipt

- The purpose of this new step in the financial process is to ensure accuracy in the bookkeeping
  - After the reconciliation form is completed, the actual amount of the purchase will be taken from an RSOs allocation, not the amount requested
  - E.g. if an RSO requests $200 for food, but ends up spending only $194.65, once the reconciliation form is filled out with the accurate amount, $194.65 will be removed from the allocation, not $200



PETTY CASH VOUCHER

Date:____________________

EXPLANATION:

Include general description of material purchased
at function or use for which materials were purchased.

Amount:__________ Account No.:________________

Amount:__________ Account No.:________________

Amount:__________ Account No.:________________

TOTAL AMOUNT: ________________

Received by:________________

Approved by:________________

Disbursed by:________________

All sales slips or other supporting data must be attached hereto. Slip must be signed in the Controller's Office by person receiving the money.

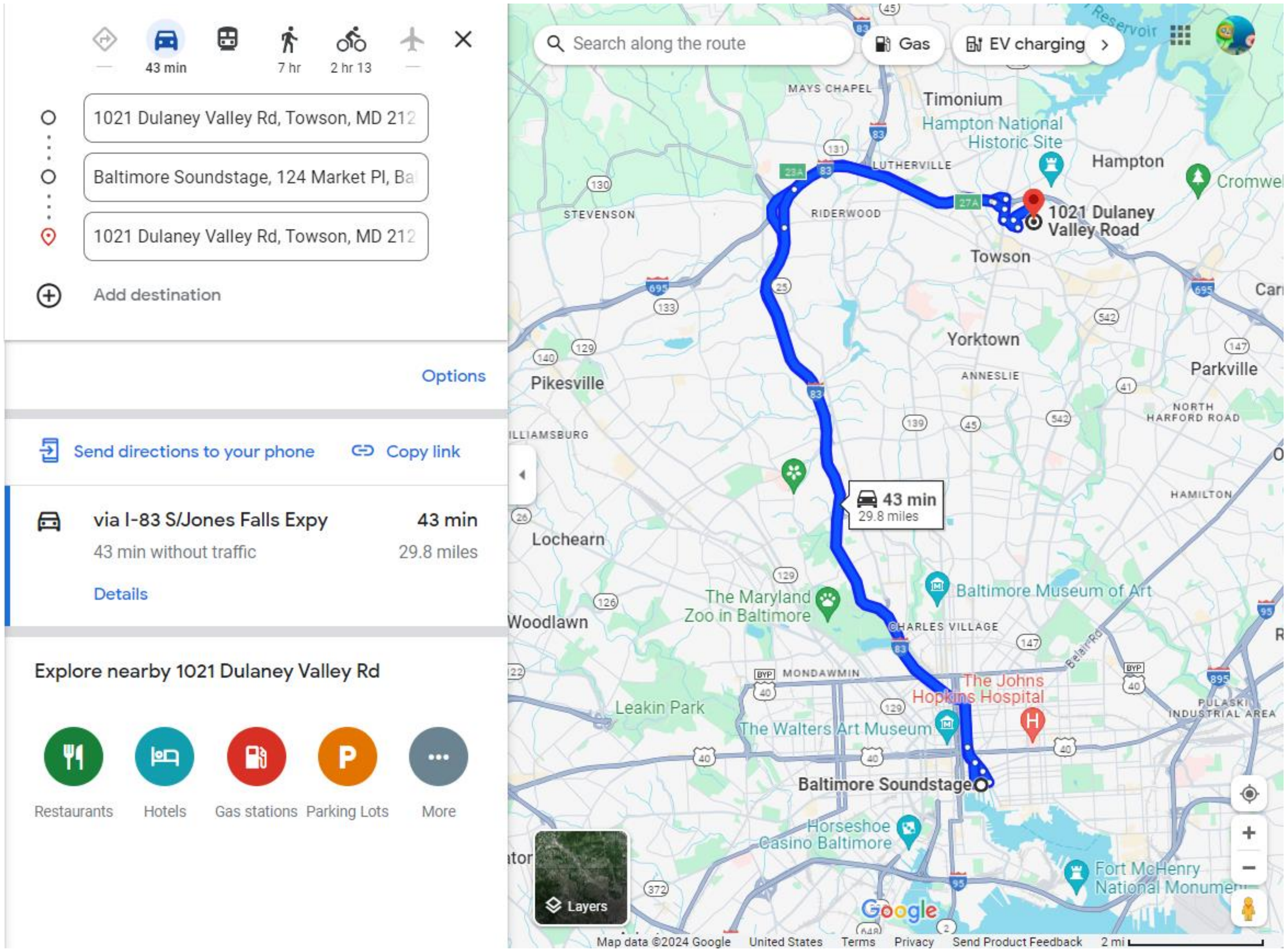
c:\mydocuments\xfiles\petty cash voucher

Reimbursement Form

- YOU fill out highlighted fields
- SGA fills out the rest
- Can be found in OSE office on the windowsill
- Turn form into SGA Treasurer

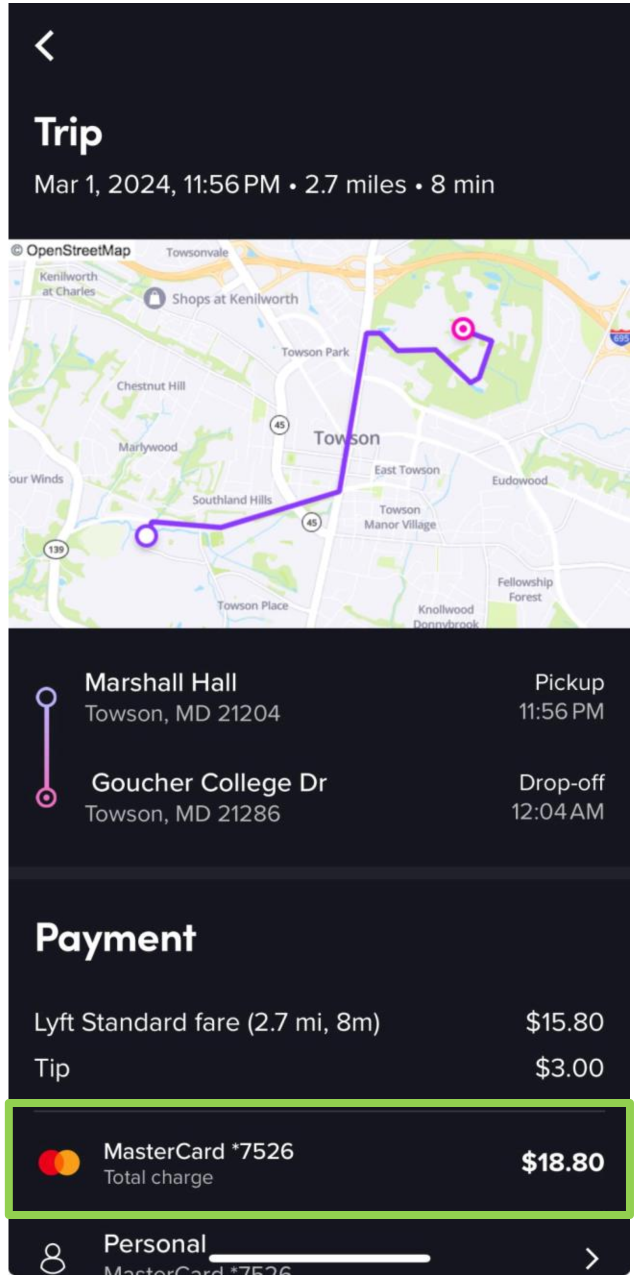
GAS REIMBURSEMENTS

- The receipt for gas mileage reimbursements is a printout of the route taken on Google Maps or another similar platform
- Components that need to be visible on the screenshot:
  - Starting address
  - Ending address
  - Total mileage of route
- The Controller's office reimburses for gas using the IRS standard rate ($0.67/mile)
- Reimbursement will be via check, not cash, regardless of amount



UBER/LYFT REIMBURSEMENTS

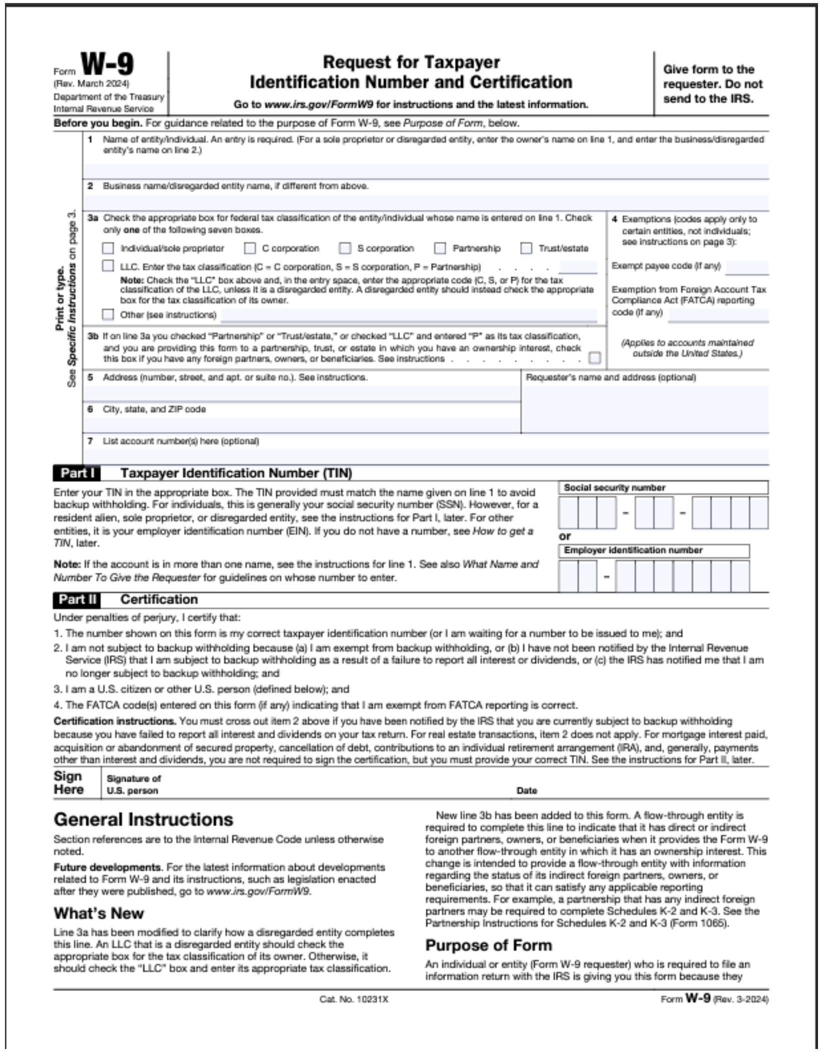
- For a receipt for Uber/Lyft reimbursements, you need a screenshot of the receipt with the following visible:
  - Ride date/time
  - Starting address
  - Ending address
  - Total mileage
  - Payment line at the bottom



HIRING AN OUTSIDE CONTRACT

You need:

- W9
- Contract
  - Group's contract if they have one
  - If not, Goucher has a Personal Services Agreement Contract
    - Must be submitted as a Word document
- Invoice
  - Address must match that on the W-9
- **Expenditure requests for hiring an outside contract must be submitted 4 weeks in advance to allow for processing of forms**



Form **W-9**
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See *Specific Instructions* on page 3.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . .

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . ☐

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)

(Applies to accounts maintained outside the United States.)

5 Address (number, street, and apt. or suite no.). See instructions.

Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

- -

or

Employer identification number

-

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here **Signature of U.S. person** **Date**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

What's New

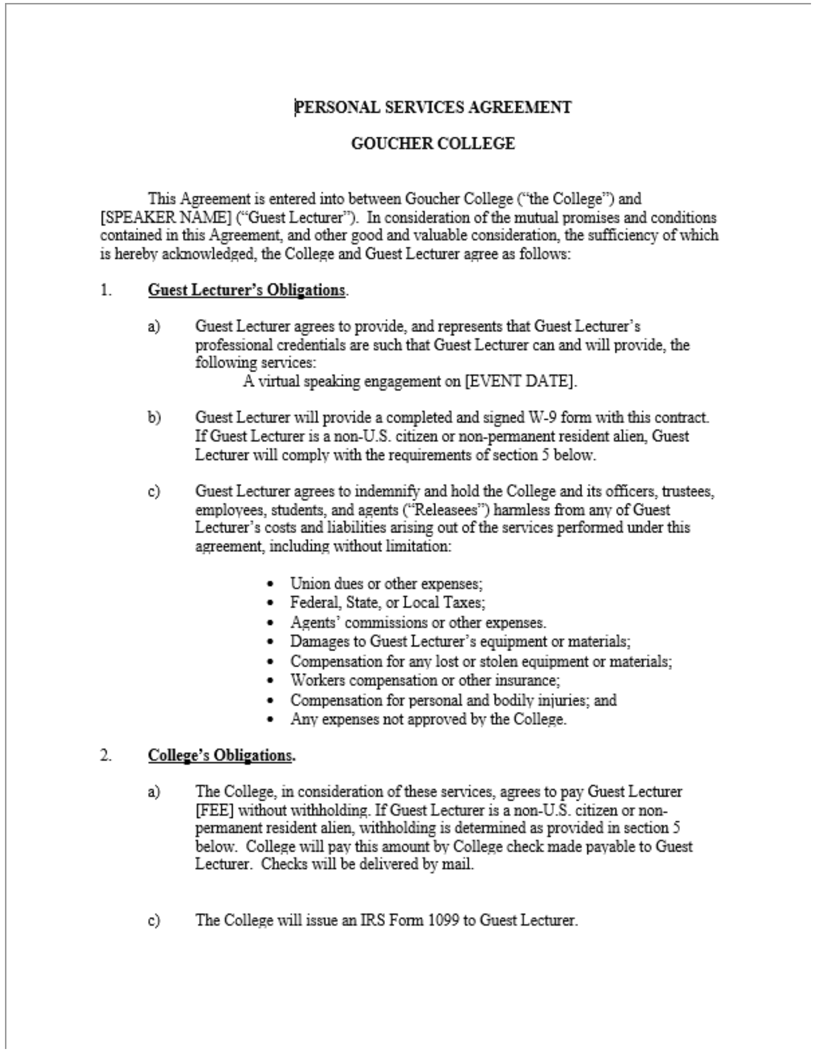
Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

Cat. No. 10231X Form **W-9** (Rev. 3-2024)



PERSONAL SERVICES AGREEMENT

GOUCHER COLLEGE

This Agreement is entered into between Goucher College ("the College") and [SPEAKER NAME] ("Guest Lecturer"). In consideration of the mutual promises and conditions contained in this Agreement, and other good and valuable consideration, the sufficiency of which is hereby acknowledged, the College and Guest Lecturer agree as follows:

1. Guest Lecturer's Obligations.

a) Guest Lecturer agrees to provide, and represents that Guest Lecturer's professional credentials are such that Guest Lecturer can and will provide, the following services:
A virtual speaking engagement on [EVENT DATE].

b) Guest Lecturer will provide a completed and signed W-9 form with this contract. If Guest Lecturer is a non-U.S. citizen or non-permanent resident alien, Guest Lecturer will comply with the requirements of section 5 below.

c) Guest Lecturer agrees to indemnify and hold the College and its officers, trustees, employees, students, and agents ("Releasees") harmless from any of Guest Lecturer's costs and liabilities arising out of the services performed under this agreement, including without limitation:

- Union dues or other expenses;
- Federal, State, or Local Taxes;
- Agents' commissions or other expenses.
- Damages to Guest Lecturer's equipment or materials;
- Compensation for any lost or stolen equipment or materials;
- Workers compensation or other insurance;
- Compensation for personal and bodily injuries; and
- Any expenses not approved by the College.

2. College's Obligations.

a) The College, in consideration of these services, agrees to pay Guest Lecturer [FEE] without withholding. If Guest Lecturer is a non-U.S. citizen or non-permanent resident alien, withholding is determined as provided in section 5 below. College will pay this amount by College check made payable to Guest Lecturer. Checks will be delivered by mail.

c) The College will issue an IRS Form 1099 to Guest Lecturer.

ENGAGE: GOUCHER FINANCIAL PROCESS DEMO

EVENT MANAGEMENT

ADVERTISING

i. Postings include, but are not limited to posters, flyers, table tents, window clings, and promotional materials.
ii. All Registered Student Organization (RSO) postings must be stamped and approved by OSE **prior to copying and posting** (RSO Handbook).

Posters/ other forms of advertisement can be approved by any time by SGA Director of Student Organizations, OSE Interns, or Pro Staff within the OSE, **in person.**
However, if your event has not been approved, approved postings should not be put up.

EVENT DEADLINES

Distinction between events and club meetings

- Events are open to the wider campus community, generally advertised.
- Club meetings are closed to the wider campus community and only involve club members. Outside speakers or guests are okay here, but generally unadvertised (unless some form of informational meeting).

Events:

- No setup required (tech, tables, chairs, etc.), space as is- **One week**
- Setup required- **Two weeks**
- **Event has to be submitted before you submit your expenditure**

Club Meetings:

- (Shouldn't need setup)- **One week**

DEADLINE TIMELINE

2 weeks prior

- Event Registration (w/ setup)
- Expenditure Request

1 week prior

- Event Registration (w/no setup)
- Club Meeting Registration

Within 2 weeks after reimbursement purchase

- Reconciliation Form **<u>IF</u>** purchase was reimbursement