

Student Organization

Advisor Roles & Responsibilities

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Overview

- What is an Advisor?
- Student Organization Community
- Roles & Responsibilities
- Student Organization Policies
- Finances
- Resources



What is an advisor?



-
- To discuss organizational **goals and objectives**.
 - **Should work** with student organizations but **not dictate** the group's programs or activities.
 - Should be **honest** in offering suggestions, **considerations or ideas**, and discussing possible **consequences**.
 - Provides a **source of continuity** within the organization and is familiar with the organization's history.
 - Should be aware of the **general and specific financial condition** of the organization, and encourage thorough record keeping.
 - Helps **train new officers** and helps students develop their **leadership skills**.
 - Should be prepared to **deal with major problems or emergencies** within the organization.
-
- **Is familiar with university policies and procedures** and helps connect student orgs to available resources.

Student Organization Community

- 320 student orgs
- 11 categories
- Benefits of student orgs
- Oversight: Student Activities & Student Organizations (SASO), Committee on Student Organizations (COSO), Student Activity Fee Allocation Committee (SAFAC), Student Org Advisors



Main advisor responsibilities

1. Complete the re-registration process
2. Facilitate organization elections
3. Maintain the organization's budget



Engage



- Home
- Calendar
- People
- Documents
- Forms
- Settings



Committee On Student Organizations (COSO)
Primary Contact: Carly Payne

16
Members

- Manage Home
- ORGANIZATION TOOLS
- About
- Roster
- Events
- News
- Gallery
- Documents
- Forms
- Elections



Re-Registration

- Engage
- Elected Officers
- Changes in Constitution
- Acknowledgement of policies– Student Rights & Responsibilities, COSO Guidelines, SAFAC Guidelines, SCC Policies
- Active & Deactivated Status



Elections

- COSO Constitution
- Facilitation
- Resources



Additional Responsibilities

- Engage Forms
 - Trip Registration Form
 - Eboard Update Form
 - Constitution Change Form
 - Name Change Form
- Remind Presidents to attend Student Organization Leadership Development (SOLD) Summit
- Performers & Contracts

Student Org Resources

- Student Org ListServ & Advisor ListServ
- Event & Meeting Reservation Requests
- Space Requests
- Student Organization Achievement & Recognition (SOAR)

Awards



Conflict & Concerns

- Org Conflict & COSO's role
- Constitutions
- Elections
- Dean of Students Office
- Stepping down from role
- Finances



SAFAC Account:

- Funds approved by the Student Activity Fee Allocation Committee (SAFAC)
 - Budget is submitted to SAFAC for review
 - SAFAC reviews budget and approves/denies line items
 - SAFAC notifies organization of their decision via email
 - SAFAC uploads the budget to the organization's Engage portal
 - Funds are transferred to the organization's SAFAC account



SAFAC guidelines must be followed when spending

Example:

- **Guideline:** SAFAC funds up to \$7 per t-shirt
- Approved budget: \$210 for 30 t-shirts (\$7 per shirt)
- Org purchased 21 shirts for a total of \$210 (\$10 per shirt)
- Org will **only be reimbursed based on guidelines** even though the total dollar amount is the same
 - \$7 per shirt x 21 shirts bought = reimbursed \$147
 - Any extra funds will be returned to SAFAC at the end of the academic year (around May)



Finances

SAFAC Budgets

Before signing off on a SAFAC budget, you might want to keep these things in mind:

- Does what they're requesting align with the org's guiding principles?
- Review the items or travel being requested
- Does the org have storage space on campus for those items?
- Are you aware of the events mentioned in their budget?
- Does the memo field for the items purchased have the same verbiage as the approved SAFAC budget?



Finances

SAFAC Budgets

SAFAC review process:

- SAFAC will review all budget submissions during their Wednesday meetings
- The budgets are approved by the Senior Vice President for Student Affairs and will be posted to an organization's Engage portal by the following Wednesday. An organization has until that Friday at 8AM to appeal
- Funds are deposited into the organization's account 7-10 days after the presentation to SAFAC.



Non-SAFAC Account:

- Dues, fundraising, purchases not approved by SAFAC, etc.
- Up to the discretion of the org to decide how to spend money
- Unused funds rollover to next fiscal year



Finances

SAFAC vs. Non-SAFAC account

Student Org Payment Site

- www.Miami.edu/studentorgpayment
- Can collect funds for dues, t-shirts, trip co-payments, etc.
- Funds will be deposited into your org's Non-SAFAC account
- Must fill out Engage form to request to add items to the site

Giving Site

- www.Miami.edu/studentorggiving
- Overseen by UM Development and Alumni Relations
- Used to collect donations. Funds are deposited into your org's Non-SAFAC account
- Can use Canefunder campaign to collect funds at




'Cane Funder


Non-SAFAC account

UNIVERSITY OF MIAMI

'CANE FUNDER

HOME FAQ APPLY FREE DIGITAL SWAG GIVE



 **Frost Student Chapter of the American Choral Directors Association: 72 in 72**

\$ 3,440

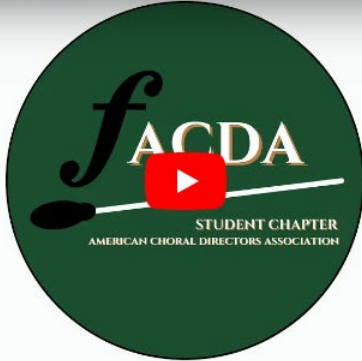
47%

Goal: \$ 7,200

15 Supporters

MAKE A GIFT

ACDA Fundraiser Video



STUDENT CHAPTER
AMERICAN CHORAL DIRECTORS ASSOCIATION

Watch on YouTube


Copy link


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Giving Site

Non-SAFAC account

 **DEVELOPMENT AND
ALUMNI RELATIONS**

Search Site 

Ways to Give Why Giving Matters Greatest Need Schools & Colleges Centers & Units Student Affairs **GIVE NOW**

LGBTQ and SpectrUM Student Support Fund

Donation Information

Select amount below

\$1000 \$500 \$250 \$100 \$50 Other

Designation: LGBTQ and SpectrUM Student Support Fund

Type of gift:

One-time gift Recurring gift

Planned Giving:

- ☐ I have included UM in my will or estate plans
- ☐ I would like info on life insur. or retirement asset gifts
- ☐ I would like information about life income gifts
- ☐ Please send information on including UM in my estate plans

CONTINUE

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Purchasing Card & Travel Card

- Please reach out to Corporate Cards inquire about using a staff member's P-card or T-Card (www.Miami.edu/corporatecard)
- Please see the link above for authorized and unauthorized purchases using a P-Card or T-Card



Personal Credit Cards

- In cases where a Workday process cannot be used to make a purchase, please use a P-Card or T-Card (if allowed). Using the church's credit card will make it difficult to get reimbursed and the reimbursement may get denied
- In the rare case where a P-Card or T-Card cannot be used and someone uses their personal credit card, please ensure it is allowed by UM policies before purchasing (please see payment matrix below).
- To reimburse from a personal card, please create an expense report in Workday. Employees are **NOT** allowed to use the student reimbursement form found at www.Miami.edu/expenseform

Payment Matrix:

Venmo, Airbnb, third-party applications

- Student organizations **are not** permitted to use Venmo or any similar third-party applications/websites to collect money.
- Students **may not** deposit organization funds into their personal bank accounts at any time. If money collected is being used to pay for approved organization activities, the money should be deposited into the organization's account and then withdrawn in accordance with the University of Miami's purchasing policies.
- Students can make cash deposits for their club by going to the Student Services Building
- Student organizations **are not** permitted to use Airbnbs or any similar third-party applications/websites to book rooms for University of Miami trips.



Student Org Store

What to use the Student Organization store for:

- Collect dues
- Funds for club merchandise (such as t-shirts)
- Club trip payments
- Chapter dues

What the Student Organization store **cannot** be used for:

- Small dollar point-of-scale activities such as bake sales
- Raffle tickets
- Donations

To add/remove/update an item submit a Student Org Store request on Engage.
Please allow 1-2 weeks in advance for all store requests.

Funds paid through the store are deposited automatically to the organization's
Non-SAFAC account









Weekly spreadsheets detailing sales are uploaded to the organization's Box file
(access given to e-board and advisor).

Student Org Store



Scuba Club

Student Organizations / Undergraduate / Scuba Club

	Scuba Club - Old Club Shirt	Price: \$10.00	Quantity: <input type="text" value="1"/>	
	Scuba Club - Hoodie	Price: \$35.00	Quantity: <input type="text" value="1"/>	
	Scuba Club - Cozumel Spring Break Trip	Price: \$1,100.00	Quantity: <input type="text" value="1"/>	
	Scuba Club - Extra 2022 Dues Shirt	Price: \$15.00	Quantity: <input type="text" value="1"/>	

<https://saso.studentaffairs.miami.edu/resources-and-policies/org-store/index.html>

Travel

Purchasing

All travel should be processed through the travel portal which can be accessed using [travel.Miami.edu](https://travel.miami.edu)

Those looking to travel can use a live agent to discuss options. A comparable showing a more cost-efficient option can be provided for those individuals looking to price match. Individuals who do not use the travel portal must provide documentation stating why they did not use it.

Student Org Travel must be registered through SASO's Engage portal.

The University of Miami Travel Program

The University of Miami Travel Program is comprised of booking channels that, within them, features travel partners. Our travel program includes a portal that houses a self-booking tool for air, hotel, and rental car rentals, as well as 1:1 live agent bookings over the phone or email.

Together, this suite of tools and services aims to ensure the safety of faculty, staff, and students while they travel; deliver exceptional travel-related services; streamline the expense reporting process; and reduce travel costs.



BOOK TRAVEL ONLINE

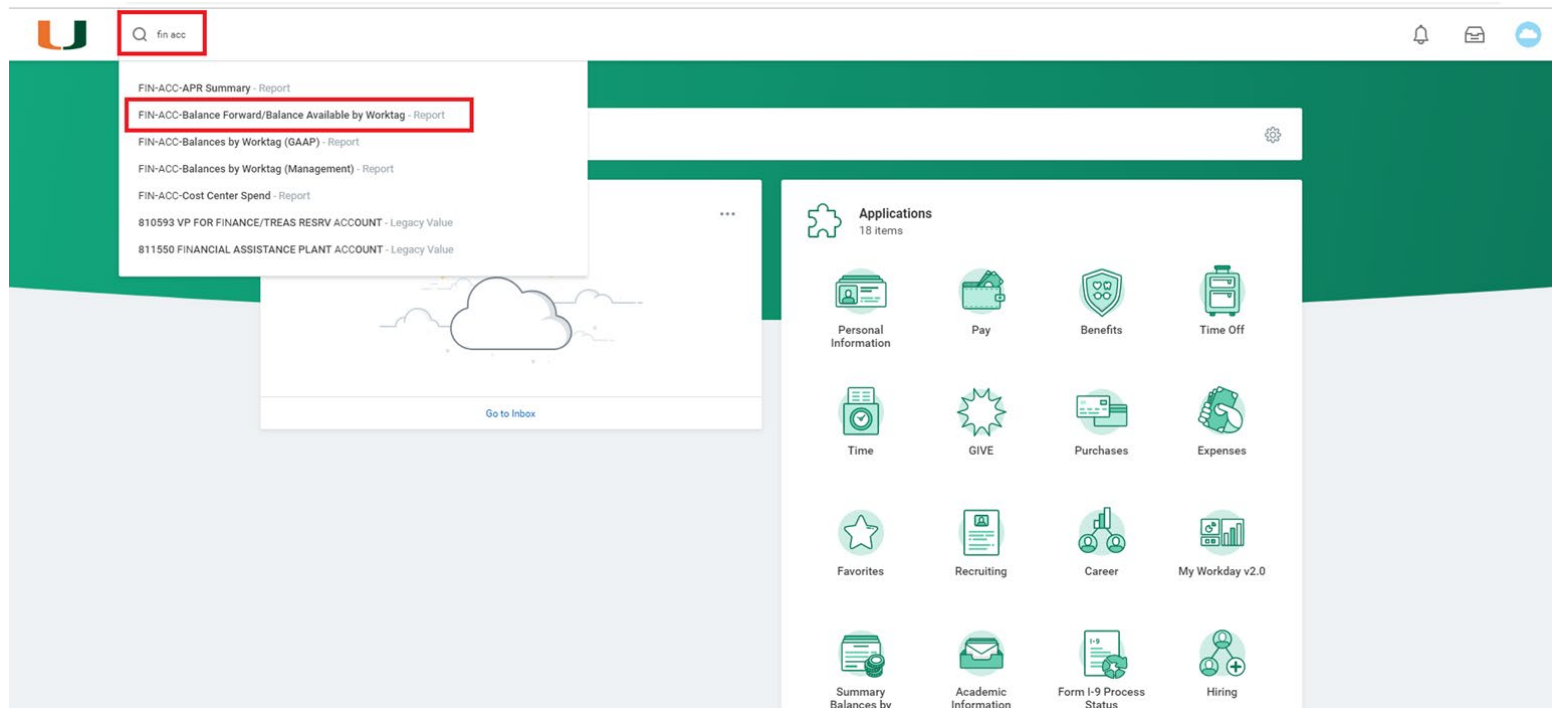


BOOK WITH A LIVE AGENT

Finances

Account Balance

- You can find your organization's Program IDs (account numbers) on their Engage portal or by searching the organization's name in the Workday search bar
- The report we recommend to view your account balance is called: **“FIN-ACC-Balance Forward/Balance Available by Worktag”**



- Review all Workday transactions in a timely manner.
- The turn-around time for reimbursements being completed is contingent upon the approval of those individuals in the approval chain.
- Scroll down to the bottom of the Workday item to review any comments before approving/denying/send back.



Finances

Reimbursements

Before you submit a reimbursement request...

- Did you attach documentation to substantiate the event/request?
Example: calendar invite, screenshot of Instagram post promoting event, etc.
- Did you check if the organization's account has enough funds?
Example: if the expense surpasses the approved SAFAC amount, the non-SAFAC account must be used
- Did you explain the business purpose of the reimbursement?
Example: "this reimbursement is for art supplies that will be used for a club activity event"
- Are you meeting the deadlines?
March 3rd – Deadline to submit early budgets to SAFAC
May 5th – Deadline to utilize all SAFAC approved budgets



Finances

Student Reimbursements

Communication is key!

- Students **DO NOT** have access to view their reimbursement in Workday
 - They do not get notified if it is approved/denied/sent back
- Communicate with the student if they need to provide you with additional documentation/information to upload on their behalf
- If the reimbursement is denied, please contact the student



Finances

Treasurer's Report

All organizations should maintain record of the approved budgets by keeping a treasurer's report. The SASO Finance team has created a template for both your SAFAC and Non-SAFAC budgets to assist you in keeping track of purchases.

[illegible]

Workday Resources Student Reimbursements

Workday Super User Certification Program

- <https://workday-info.miami.edu/super-users/index.html#resources>

WalkMe ActionBot

- <https://workday-info.miami.edu/training/walkme-for-workday/index.html>

ULearn: Cost Center Manager (CCM) Basics

- <https://umiami.csod.com/ui/lms-learning-details/app/course/3564f0b4-459a-4290-869f-1c4e0ea92c74>

ULearn: Workday Expenses

- <https://umiami.csod.com/ui/lms-learning-details/app/course/a9f3b7bc-b506-5ee980846b85>

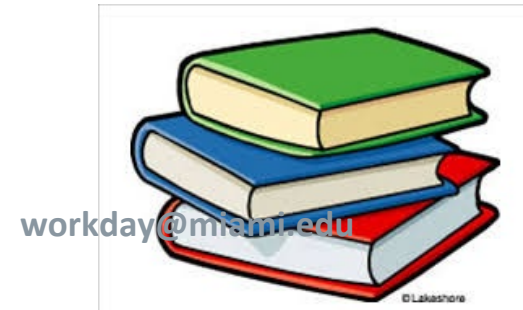


Resources

- Student Activities and Student Organizations (SASO) – www.miami.edu/saso
- Committee on Student Organizations (COSO) – www.miami.edu/coso
- Student Activity Fee Allocation Committee (SAFAC) – www.miami.edu/safac
- [Student Organization Handbook](#)
- [Student Center Complex Policies & Space Reservations](#)
- [Contract Policies & Performance Contracts](#)
- [Travel Policy](#)

Contacts

- Advisor Responsibilities, contracts, travel waivers, Engage, elections
 - Mercy Lavado - Associate Director, SASO – m.lavado@miami.edu
- Student Activities and Student Organizations (SASO)
 - saso@miami.edu
 - sasofinance@miami.edu (club finance questions)
- Committee on Student Organizations (COSO)
 - Coso_chair@miami.edu
- Student Activity Fee Allocation Committee (SAFAC)
 - safac@miami.edu



Resources

- [Advisor Guide to Student Org Finances](#) (Workday step-by-step guide)
- [Advisor Resources](#)
- [Common Spend Categories](#)
- [Deposit Slip](#) – how to fill it out
- [How to Find Organization's Account Numbers in Engage](#)
- [How to Spend Organization Funds](#)
- [How to check on a student's reimbursement status](#)
- [Purchasing Resources/Training](#)
- [Student Reimbursement Resources](#)

Contacts

- Student Org Payment Site, Workday access, Account questions
 - Nadege Nias - Senior Financial Assistant, SASO – n.nias@miami.edu
 - Vanessa Velis Barbieri - Manager, Business & Financial Operations, SASO
v.velisbarbieri@miami.edu
- Amazon Training in Workday
 - Kimberly Jiminson – Trainer, IT – kxj329@miami.edu
- Workday team workday@miami.edu
- Purchasing Department
 - www.purchasing.miami.edu
- Disbursements disbursements@miami.edu





Student Organization Advisor Workshop Series

UM Purchasing Q&A

Thursday, February 2nd 12PM-1PM
Shalala Student Center Activities Room South
Lunch to be provided
Please RSVP on Engage



DEPARTMENT of
STUDENT ACTIVITIES &
STUDENT ORGANIZATIONS

Questions?

