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01

Google Drive

Utilizing your Drive to allow for easy accessibility
Creating a shared drive

Access your Google Drive by visiting http://www.drive.google.com/ and logging in with your UM credentials.
Creating a shared drive

1. Click “New” ->
2. “Folder” ->
3. Name your Folder ->
4. Right click + “share” ->
5. Enter organization member emails
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<th><strong>Other</strong></th>
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<td>❖ Miscellaneous</td>
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Utilize Box for large files

- Visit box.miami.edu and login with your UM credentials
- As a UM student, Dropbox is provided to you with unlimited cloud storage
- Use this to your advantage for larger files such as videos, photos, etc.
02
Engage
Navigation around your organization’s Engage page
Your Engage Page

Access your Engage page at engage.miami.edu and log in with your UM credentials.

Search the name of your organization.

Click the “manage organization” button on top right of page (only seen as Eboard member of organization)
Your Engage Page

After clicking “manage organization,” click on the button with three lines on top left.

Here, you can edit your Engage roster (including Eboard and Advisor roles), create forms, upload documents, and create Engage events.
03

Emails

Creating Email templates and maintaining professionalism
Emails (Sample)

Email Templates (on one Google Doc)

- To Organizations
- To Students
- Other

Communication between other organizations
- Collaboration, Requests, etc.

Communication to General Body Members
- Acceptance/Denial letters, Announcement templates, etc.

Create templates depending on the goals and purpose of your organization. See what type of emails are sent the most from you.
Emails

Sample Email Template

❖ Title of Email - Designated sender of Email
❖ Who to copy on the email
❖ Who to send the email to
❖ Subject line
❖ Greeting
❖ Body (depending on type of email)
❖ Highlight and bold areas that need to be edited
❖ Signature/Thank you

Delegate Acceptance Email - Chair

To: Accepted Applicant

Who to copy: Chair, Vice Chair, Advisor

Subject: COSO Applicant Decision

Congratulations! While we had an extremely competitive pool of applicants, we were very impressed with your application and interview, and believe you would be a great asset to the team. At this time, we would like to offer you a position as delegate on the 2020-2021 Committee on Student Organizations (COSO).

Please respond to this email by [DATE] to accept the position.

As a reminder, it is required for delegates to be able to attend the complete committee meeting every Monday from 2:30-4:30pm. At our first meeting, we will go through training for new delegates where we will discuss delegate responsibilities and information about what COSO does. Please complete this short form so we can plan for this semester.

Congratulations again,

[NAME]
Creating a signature (via Outlook Website)

- Login to your organization email using Outlook
- Click on the settings gear on the top right corner
- Click “View all Outlook settings” at bottom
- Mail -> Compose and reply
- Clearly list your name, position, organization, and contact information where necessary
Meetings
Running meetings, Taking organized minutes
Meeting Documents

**Agendas**
- CREATE TEMPLATES
- Include topics of discussion for meeting
- Any urgent issues which need addressing
- Chronologically ordered list

**Minutes**
- CREATE TEMPLATES
- Eboard updates
- Advisor updates
- What is discussed under each topic of discussion from agenda
- Concise yet detailed for members who were absent or as a reference
Meetings

Sample Minutes Template

❖ Include Date/Time and Location of meeting
❖ Attendance
❖ Topics of discussion/any subpoints pertaining to those topics
❖ Delegate and Eboard Updates
❖ Advisor Updates
❖ Any other miscellaneous discussion points
❖ Keep minutes concise, do not need to write down everything verbatim but rather enough to understand the context of the discussion
❖ Write brainstormed ideas/opinions/elements to reference or think about
Budgeting
How to budget
Budgeting

Submitting a SAFAC Budget

❖ Assign a SAFAC Liaison
❖ Select type of budget
  ➢ Early Budgets
    ■ Submitted a semester early to be used in later semester
  ➢ Regular Budgets
    ■ Submitted any time during the academic year for non-travel funds to be used in the same academic year
  ➢ Travel Budgets
    ■ Submitted any time during the academic year for funds specifically relating to travel
Budgeting

Submitting a SAFAC Budget

❖ Prepare your budget
  ➢ Visit miami.edu/safac to obtain budget template and other documentation

❖ Meet with a SAFAC Liaison
  ➢ Obtain required signatures and follow provided instructions by liaison

❖ Review with the SAFAC Committee
  ➢ Present your budget to SAFAC. Regular Budgets are required to be presented, Travel/Early Budgets are not required to present

❖ After SAFAC approval:
  ➢ Double check budget before making purchases
  ➢ Collect receipts and backup documentation and submit at miami.edu/expenseform
  ➢ Receive reimbursements
  ➢ Purchase cards (P-Cards) and Travel cards (T-cards) can be utilized at miami.edu/corporatecards
Budgeting

Submitting a SAFAC Budget

❖ SAFAC Resources:
  ➢ Website:
    ■ https://saso.studentaffairs.miami.edu/manage-an-org/student-activity-fee-allocation-committee/safac-resources/index.html
  ➢ Engage:
    ■ https://miami.campuslabs.com/engage/organization/safac
  ➢ Email:
    ■ safac@miami.edu
Quick Resources
Forms and other information
Quick Resources

Follow the links below to access applicable forms, websites, etc.

COSO Links

Linktree:
https://linktr.ee/umcoso

Website:
https://saso.studentaffairs.miami.edu/manage-an-org/committee-on-student-organizations/index.html

Engage Page:
https://miami.campuslabs.com/engage/organization/committee-on-student-organizations-coso

Instagram:
@umcoso

Email:
coso_chair@miami.edu

Forms

Executive Board/Advisor Update Form:
https://miami.campuslabs.com/engage/submitter/form/start/503795

Constitution Update Form:
https://miami.campuslabs.com/engage/submitter/form/start/433869

All other current forms can be found on our Engage page.
Thanks!

The Committee on Student Organizations thanks you for your involvement on campus!

CREDITS: This presentation template was created by Slidesgo, including icons by Flaticon, and infographics & images by Freepik