Student Organization Meeting

AGENDA
INTRODUCTIONS
FINANCE
TRAVEL
FUNDRAISING
SPACE & RESOURCES
EVENTS
TRANSITION
Where do I find that?
...have you noticed some changes, here’s what’s new

- Where do I go in the HUB?
- Where do I go online?
Finance

- **Weekly Treasurer Report**
  - Sent from Student Senate Treasurer to Org Pres., Treas., & Advisor
  - Attached documents:
    - CEA Guidelines, Proposal Form & Spreadsheet
    - Updated Student Org Balance Sheet
  - Information:
    - Dates for meetings, deadlines, etc.

- **Budget Reports**
- **P-Cards**
- **Contracts**
- **Finance Online**
How to read a student org balance report:

<table>
<thead>
<tr>
<th>Fund</th>
<th>Org Desc</th>
<th>ORG</th>
<th>Balance Forward</th>
<th>Revenues</th>
<th>Expenses</th>
<th>Ending Balance</th>
<th>YTD Commitments</th>
<th>Unappropriated Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>6DT120</td>
<td>Accounting Admin</td>
<td>PTACCT</td>
<td>723,188.56</td>
<td>729,604.69</td>
<td>(6,416.13)</td>
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<td>(1,101.66)</td>
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<td>6DT120</td>
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<td>PTALTSS</td>
<td>5,962.60</td>
<td>4,800.00</td>
<td>(6,408.05)</td>
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<td>American Chemical Society-Students</td>
<td>PTACCSS</td>
<td>1,435.53</td>
<td>1,435.53</td>
<td>0.00</td>
<td>0.00</td>
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<td>6DT120</td>
<td>American Choral Dir Assoc</td>
<td>PTACDA</td>
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<td>(417.32)</td>
<td>417.32</td>
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<td>75.66</td>
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<td>(158.74)</td>
<td>234.40</td>
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<td>(3,084.94)</td>
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<td>1,275.00</td>
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<td>156.73</td>
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<td>0.00</td>
<td>156.73</td>
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<td>6DT120</td>
<td>Chi Alpha</td>
<td>PTCHIPH</td>
<td>46.23</td>
<td>0.00</td>
<td>(229.19)</td>
<td>275.42</td>
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<td>PTCHSC</td>
<td>433.00</td>
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<td>433.00</td>
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<td>6DT120</td>
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<td>PTCL16</td>
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<td>Class of 2017</td>
<td>PTCL17</td>
<td>1,784.80</td>
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<td>(20,364.03)</td>
<td>22,148.83</td>
<td>50.00</td>
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<td>(6,266.44)</td>
<td>7,199.42</td>
<td>16.60</td>
<td>7,182.82</td>
</tr>
</tbody>
</table>
Purchasing Cards

WHAT YOU NEED TO KNOW...
The Purchasing Card (P-Card) is the property of University System of New Hampshire, however the Cardholder is responsible for the security of the card and for transactions made against the card while in the Cardholder’s possession.

The Cardholder agrees to adhere to all System and University policies and procedures.

The Cardholder must report the card lost or stolen immediately by contacting Nicole Connolly.
PCard Terms & Conditions

Purchasing Card Terms & Conditions for Use

- The Purchasing Card (P-Card) is the property of University System of New Hampshire; however, the Cardholder is responsible for the security of the card and for transactions made against the card while in the Cardholder’s possession.
- The Cardholder agrees to adhere to all System and University policies and procedures.
- The Cardholder must provide original, itemized receipts for all transactions.
- Original receipts must be submitted to the Student Organization Account Manager, Nicole Connolly, within 48 hours of the transaction.
- Items requiring shipment must be shipped to the Cardholder’s suite box: 19 Highland Ave. Suite Box # Plymouth NH 03264
- Single transactions cannot exceed $1,000.
- No more than 10 transactions are allowed per day.
- The Cardholder must report the card lost or stolen immediately by contacting Nicole Connolly.

<table>
<thead>
<tr>
<th>Authorized Purchases</th>
<th>Restricted Purchases - Require Pre-approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Supplies</td>
<td>Advertising (promotion),</td>
</tr>
<tr>
<td>Business Meals</td>
<td>Air conditioners, Space heaters</td>
</tr>
<tr>
<td>Equipment (less than $5,000 including all fees)</td>
<td>Air/Rail tickets</td>
</tr>
<tr>
<td>Membership Dues &amp; Fees</td>
<td>Animals</td>
</tr>
<tr>
<td>Postage (Campus Mail excluded)</td>
<td>Automotive repairs</td>
</tr>
<tr>
<td>Printing &amp; Copying (Campus Print Shop excluded)</td>
<td>Awards, Gifts and Prizes</td>
</tr>
<tr>
<td></td>
<td>Conference Registration Fees</td>
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<tr>
<td></td>
<td>Construction/Repair/Renovations</td>
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<tr>
<td></td>
<td>Consumer to Consumer Example: Ebay/Etsy</td>
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<td></td>
<td>Entertainment</td>
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<td></td>
<td>Gasoline (Rental Vehicles only)</td>
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<td></td>
<td>Hotels &amp; Lodging</td>
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<td></td>
<td>Flowers</td>
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<td></td>
<td>Movie theater/Event tickets</td>
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<td></td>
<td>Radioactive materials</td>
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<tr>
<td></td>
<td>Services, ie Consulting, Design</td>
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<tr>
<td></td>
<td>Telephone equipment</td>
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<tr>
<td></td>
<td>Travel expenses</td>
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<tr>
<td></td>
<td>Vehicle Rental</td>
</tr>
<tr>
<td></td>
<td>Weapons or Ammunition</td>
</tr>
</tbody>
</table>

Unauthorized Purchases - Never Allowed

- Alcohol
- Cash Advances
- Donations
- Equipment (over $5,000)
- Help Wanted Advertising
- Leases of real property
- Personal Meals
- Personal Supplies
- Purchases where a conflict of interest exists

By signing this document I certify I have read and understand the policies and procedures on the appropriate use and handling of the P-Card and do hereby agree to comply with them.

Student’s Name Printed: ________________________________

Student’s Signature: ________________________________ Date: ________________________________
TURN IN YOUR RECEIPTS

- The Cardholder must provide original, itemized receipts for all transactions.

- Original receipts must be submitted to the Student Organization Account Manager, Nicole Connolly, within 48 hours of the transaction.
# Student Organization Pcard Expense Form

**Organization Full Name (no abbreviations):**

**Student’s Name:**

**What do you intend to purchase?**

**How much do you anticipate the purchase to cost?**

**Cardholder Responsibilities:**

- The Cardholder must provide original, itemized receipts for all transactions.
- Original receipts must be submitted to the Student Organization Account Manager, Nicole Connolly, within 48 hours of the transaction.
- Receipts must be submitted to the Student Organization Account Manager, Nicole Connolly, within 48 hours of the transaction.
- Items requiring shipment must be shipped to the Cardholder’s suite box:
  - 19 Highland Ave.
  - Suite 2B
  - Plymouth, NH 03264
- There is a $1,000 maximum dollar value per transaction.

**Authorized Purchases**

<table>
<thead>
<tr>
<th>General Supplies</th>
<th>Advertising (promotional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Meals</td>
<td>Air conditioners/Space heaters</td>
</tr>
<tr>
<td>Equipment (less than $5,000 including all fees)</td>
<td>Air Rail tickets</td>
</tr>
<tr>
<td>Membership Dues &amp; Fees</td>
<td>Automotive repairs</td>
</tr>
<tr>
<td>Parking (off-campus)</td>
<td>Awards, Gifts and Prizes</td>
</tr>
<tr>
<td>Parking (on-campus)</td>
<td>Conference Registration Fees</td>
</tr>
<tr>
<td>Printing &amp; Copying (on-campus Print Shop excluded)</td>
<td>Construction Repair, Renovations</td>
</tr>
<tr>
<td>Printing &amp; Copying (off-campus Print Shop included)</td>
<td>Consumer &amp; Business Examples, Email &amp; Fax</td>
</tr>
<tr>
<td>Printing &amp; Copying (off-campus Print Shop excluded)</td>
<td>Entertainment</td>
</tr>
<tr>
<td>Printing &amp; Copying (on-campus Print Shop included)</td>
<td>Gasoline (rental vehicles only)</td>
</tr>
<tr>
<td>Printing &amp; Copying (on-campus Print Shop excluded)</td>
<td>Tents &amp; Lodging</td>
</tr>
<tr>
<td>Printing &amp; Copying (off-campus Print Shop included)</td>
<td>Flowers</td>
</tr>
<tr>
<td>Printing &amp; Copying (off-campus Print Shop excluded)</td>
<td>Movie theater/Event tickets</td>
</tr>
<tr>
<td>Printing &amp; Copying (on-campus Print Shop included)</td>
<td>Radiative materials</td>
</tr>
<tr>
<td>Printing &amp; Copying (on-campus Print Shop excluded)</td>
<td>Services, in Consulting, Design</td>
</tr>
<tr>
<td>Printing &amp; Copying (off-campus Print Shop included)</td>
<td>Telephone equipment</td>
</tr>
<tr>
<td>Printing &amp; Copying (on-campus Print Shop excluded)</td>
<td>Travel expenses</td>
</tr>
<tr>
<td>Printing &amp; Copying (on-campus Print Shop included)</td>
<td>Vehicle Rental</td>
</tr>
<tr>
<td>Printing &amp; Copying (on-campus Print Shop excluded)</td>
<td>Weapons or Ammunition</td>
</tr>
<tr>
<td>Printing &amp; Copying (off-campus Print Shop included)</td>
<td>Purchases where a conflict of interest exits</td>
</tr>
</tbody>
</table>

**Restrictive Purchases – Require Pre-approval**

- Alcohol
- Cash Advances
- Donations
- Equipment (over $5,000)
- Help Wanted Advertising
- Leases of real property
- Personal Supplies
- Purchases where a conflict of interest exists
- Tobacco Products
- Travel, Conference, Entertainment
- Vehicles
- Weapons or Ammunition

Intended purchase is within USSHE policy. Office staff initials.

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**Student Organization Pcard Expense Form**

**Department Card # or P-Card:**

**Please attach detailed receipts here**

**Organization Full Name (no abbreviations):**

**Org Code:**

**Begin with PT**

(Found on Student Org Budget Report)

**What was purchased?**

**Store where purchased:**

**Why were the purchased item(s) needed?**

*If food was purchased for a meeting, include the number of people attending.*

**Total expense:**

The completed form and receipt(s) must be submitted within 2 business days of purchase to Nicole Connolly in the HEB 121A. By signing below, I acknowledge that the purchase of the item(s) listed on the receipt were for University related business and NOT for personal use. Upon review, if any item is deemed personal, I may be held liable to reimburse the University.

**Signature**

**Printed Name**

**Date Signed**
Additional Information

Items requiring shipment must be shipped to the cardholder’s suite box:

19 Highland Ave.
Suite box #
Plymouth, NH 03264

Single transactions cannot exceed $1,000.

No more than 10 transactions are allowed per day.
Authorized Purchases

- Business Meals - tip cannot exceed 18%
- Non-travel registration fees
- General Supplies
- Membership dues & fees
- Printing & copying (campus printing services excluded)
- Postage (campus mail services excluded)
- Rentals with no intent of eventual purchase
- Limited services (equal to or less than 15%)
  - Example: Design fee for T-shirts.
Restricted Purchases

- Advertising (promotional)
- Air conditioners/Space heaters
- Air/Rail tickets
- Animals
- Automotive repairs
- Awards, gifts, and prizes
- Conference Registration –Travel Required
- Construction/Repair/Renovations
- Consumer to Consumer Example: Etsy/Ebay
- Entertainment
- Flowers
- Gasoline (Rental and Fleet only)
- Hotels & Lodging
- Movie theater/Event tickets
- Radioactive materials
- Professional Services
- Telephone equipment
- Travel expenses
- Vehicle Rental
- Weapons or Ammunition

MUST BE APPROVED BY FINANCIAL SERVICES OFFICE
Un-Authorized Purchases

- Alcohol
- Cash advances
- Deposits *Example: Room Rentals*
- Donations
- Equipment (over $5,000)
- Gift cards
- Help wanted advertising
- Personal meals
- Personal supplies
- Purchases from University employees, their spouses, parents, children or from any other individual where a conflict of interest exists.
- Leases of real property or lease-to-own costs
Are you traveling?

YOU WILL NEED TO RESERVE A TRAVEL PCARD THREE WEEKS IN ADVANCE OF YOUR TRIP WITH NICOLE
Any questions so far?
Finance Resources Online

WHAT YOU NEED TO KNOW ABOUT CONTRACTS

FORGET HOW TO READ YOUR BUDGET REPORT?

DEPOSITS & REIMBURSEMENTS

CEA (CONFERENCE, EVENT & ACTIVITY) FORM

ALLOCATIONS FORM
Fundraising

REGISTER YOUR FUNDRAISER
  WHO?
  WHAT?
  HOW?
  WHEN?

IS IT A RAFFLE?

ARE YOU SOLICITING MERCHANTS?

ARE YOU TABLING?

ARE YOU SEEKING ONLINE DONATIONS?
Travel

ARE YOU GOING FOR THE DAY AND TAKING PERSONAL VEHICLES? IF SO = PERSONAL VEHICLE WAIVER

IS THIS AN OVERNIGHT TRIP, OR A DAY TRIP WITH RENTED, CHARTERED OR OTHER PSU PAID TRANSPORTATION? IF SO +

- ORG TRAVEL FORM
- TRIP WAIVER
- TRAVEL ROSTER
- TRAVEL ITINERARY

IS ANYONE TRAVELING SEPARATE FROM THE GROUP AT ANY TIME, IF SO = DEVIATION FORM

IF FLYING = AIRFARE PURCHASE AGREEMENT

RESOURCE = TRAVEL GUIDE FOR TRIP LEADERS
RESOURCES & SPACE

- PSU ORG EMAIL ACCOUNTS + OFFICE 365 SHARED SPACE
- STUDENT ORG SPACE RESOURCES
- ADMIN OFFICE RESOURCES
Transition

SHARE DOCUMENTS:

- ORG. MISSION, CONSTITUTION, BY-LAWS, PROCEDURES
- CONTACT LISTS
- RESOURCE LISTS
- "JOB" DESCRIPTIONS & NOTES W/ FEEDBACK
- BUDGET INFORMATION
- "YEAR-END REPORTS" & POST-EVENT FORMS
- GOALS & PRIORITIES – MET AND UNMET
- WORK PLAN FOR REGULAR PROJECTS
- AGENDAS & MINUTES – GUIDE & RECORDS
Transition Activity 1

Discuss with the incoming officer taking your role what your position was like.

What did you like best, least... what was a difficult decision... what could you have done to make the experience better... what were obstacles & aids to performing your job... anything you wish you’d known coming in?
Transition Activity 2

Discuss as a group, where you perceive the organization to be at?

What do you perceive the org objectives & goals to be, and how are you doing at accomplishing them?

What are your organization’s:

- Strengths
- Weaknesses
- Opportunities
- Threats
Transition Activity 3

How’s the morale of your organization? What can you do improve or maintain the moral of the group?

How can you best support the members of your group in your role?

How will you develop younger members?

What incentive is there for members to contribute to the organization?
Transition Activity 4

Think about and discuss the expectations you have for:

Yourself in your office

The executive board

General members

Your advisor
Transition Activity 5

Develop and discuss the timeline for your organization... create a work plan:

What needs done this spring?

What needs done this summer?

What needs done in the fall?

(Note any barriers, resources or solutions that should be considered)