

'20-'21 OFFICER TRAINING

Mackenzie Ess (Internal Vice President)
Yousr Dhaouadi (Comptroller)

Graduate Student Organization
Syracuse University



Welcome



gso.syr.edu

- **Contacts:**
 - **Mackenzie Ess** (Internal VP) – Non-financial issues, student organizations, GSO Senate, Travel Grant Program
 - GSOInternalVP@syr.edu
 - **Yousr Dhaouadi** (Comptroller) – Financial problems, event pre-approval, fiscal policy
 - GSOComptroller@syr.edu
- GSO website: gso.syr.edu

GSO Policies

- For policy information:
 - Registered Graduate Student Organization (RGSO) Handbook
 - GSO Website – “Student Orgs” tab
 - Fiscal Policy
 - GSO Website – “About” tab
 - GSO Constitution
 - GSO Website – “About” tab



gso.syr.edu

Graduate Student Organization | Syracuse University

Serving graduate students since 1968

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Registration Requirements

- All student organizations registered with the GSO must:
 - Have a constitution on file (see Handbook for details)
 - Have a faculty or staff advisor
 - Have a signed advisor contract on file
 - Have a minimum of four officers on file
 - Have two officers attend officer training sessions
 - Have no undergraduate members

For complete instructions, please see the [New Graduate-Only Student Organization Packet](#). Please see the [GSO Recognized Student Organization Manual](#) for full details on student organization policies.

Registration and Re-registration

- If any of the required information changes, contact the Internal VP
- There are no deadlines for new organizations to register with the GSO
 - New organizations must be registered before they can apply to the GSO for funds
- Established organizations must re-register with the GSO by the end of each academic year

Travel Grant

Student Organizations

Resources

RSO Update

Please use the form below to inform the GSO's VP of Internal Affairs of any changes to your organization's officer roster, constitution or by-laws, and advisor and/or advisor contract.

RSO Update Form

Registered Organizations

Organization Renewal

Organization Update

Organization Handbook
(Being Updated)

Officer Training Materials

We would like to update our: *

- ☐ Officer Roster
- ☐ Constitution/By-laws
- ☐ Advisor/Advisor Contract
- ☐ Other

Registration and Re-registration

- Established organizations re-register on the GSO website under the tab “Student Orgs”
 - Follow the link to “Organization Renewal”
- New organizations register on the GSO website under the tab “Student Orgs”
 - Follow the link to “Registering New Organizations”
 - Note, this is for new organizations without undergraduate members



gso.syr.edu



Student Organizations

Registering New Organizations

Registered Organizations

Organization Renewal

Organization Update

Organization Handbook
(Being Updated)

Officer Training Materials

Benefits of Registration

- Allowed to use “at Syracuse University” in your name (see Handbook for details)
- Allowed to reserve and use campus space
- Allowed to advertise events on campus
- Eligible to apply for GSO funding
- Eligible to fundraise through the Graduate School

Space Reservation

- Caveat → the information on the next slides describes how space reservation occurred prior to COVID-19 restrictions
- **Space reservation is necessarily more challenging now for the health and safety of our campus community.**
- **We'll come back to new (and continuously developing) guidelines for space reservation.**

Space Reservation (pre-COVID)

- Space reservation is handled by Student Centers and Programming Services (SCPS)
 - scps.syr.edu
 - SCPS has final say on space usage
- To Reserve, visit the SCPS website!
 - Scheduling > Registered Student Org Forms
- Make sure to indicate that you're registered with the GSO!
 - Examples:
 - “History Graduate Student Organization”
 - “Iranian Student Association (GSO)”
 - **Add “(GSO)” to the end of your org name if it doesn't have it!**

Space Reservation (pre-COVID)

- Most requests take 2-3 days to process
- For the use of large spaces (Schine, etc.), more time is needed
 - Plan ahead!
- Inn Complete reservation form is available on the GSO website under “Financial Forms”

Space Reservation (mid-COVID)

- Restrictions as of July 31st, 2020
 - No gatherings over 50 people outside, no more than 25 inside
 - No outside (off-campus) speakers
 - Plan for space reservation weeks in advance, more if you have a larger group
 - Consider meeting online (e.g., Zoom) if possible
- Student Centers and Programming Services (SCPS)
 - Contact Becki Bruzdinski → rlbruzdz@syr.edu
 - scps.syr.edu

Space Reservation (mid-COVID)

<http://scps.syr.edu/>

Syracuse University

Student Centers and Programming Services

[SU Home](#) | [MySlice](#) | [University Event Calendar](#)

[Home](#) [About](#) [Schine Student Center](#) [Goldstein Student Center](#) [Scheduling](#) [Event & Technical Services](#)

[Home / Scheduling / Registered Student Org Forms](#)

Registered Student Org Forms

Please select the appropriate form for the space you are reserving. If you need to click here.

If you would like an estimate of the costs for your event please [click here to submit form](#).

Academic/Administrative
Forms

[Registered Student Org
Forms](#)

Fees

Policies

Update Cancellation Form

Search:

Search Site

Search

in this section

[Scheduling](#)

[Academic/Administrative
Forms](#)

Space Reservation (mid-COVID)

<http://scps.syr.edu/>

Meeting Rooms/Classrooms

Event Spaces

Atrium Table/Terrace Table

Barnes Center Tabling Request Form (reserved directly through the Barnes Center)

Banners

- [Digital Kiosk Poster](#)

Outdoor Spaces

Reservation Update/Cancellations

Advertising

- Electronic Advertising
 - Let Jessica Montgomery, GSO External VP (GSOExternalVP@syr.edu), know about your event at least two weeks in advance to be included on the GSO Facebook page and other electronic means (Twitter, etc.)
- Posting Flyers
 - Requires permission
 - Each academic building has a controlling department or other organization
 - To post a flyer, you must get permission first!
 - For quad, and other central locations, you must get GSO approval first
 - Send posters to the Internal VP
 - Approved posters must be individually signed

Advertising

- All advertisements for your organization must contain:
 - Your organization's name
 - If the advertised event is GSO funded, the ad must state this explicitly
 - Date, time, and location of event
- Non-English flyers and posters must have an English translation on file with the GSO/Graduate School

University Trademarks

- Use of University logos, seals, and other trademarks
 - May not be used for commercial purposes
 - Must be approved by the Director of Marketing and Trademark Licensing
 - (315) 443-2838

GSO Funding Options

- New Organizations:
 - Start Up Funds
- Established Organizations:
 - Annual Budget
 - Special Programming Requests
 - Supplements AB
 - One per semester, multiple events per application
- **Start-Up and Special Programming funds may only be requested by an officer who has completed this training!**
- **Reimbursement requests can only be submitted by officers who have completed this training!**

Pre-Approval

- All RSOs must submit pre-approvals before any expenditure(s) take place.
- Must have an idea on what your budget etc. will be spent on.
- If we will be paying a non-SU group/business, we need to know 4-6 weeks in advance
 - This will require tax forms (W9) and additional paperwork
- If there will be alcohol at the event at a location other than the Inn, we need to know ~1 month in advance
- For anything out of the ordinary, follow up with the Comptroller or Financial Secretary

Overview on Spending Money

- Must inform us **TWO WEEKS** before an event occurs for pre-approval
- **GSO operates on reimbursements only**
 - You or your department must spend the money up front, then we reimburse afterwards, except in a few situations
 - **Use your department**, especially for big-ticket events
 - Yousr Dhaouadi, Comptroller (gsocomptroller@syr.edu) with questions
- We must follow the University Fiscal Policy strictly
 - Communicate with us fully to avoid issues!
- Expenses must be pre-approved

Annual Budget

All current RSOs have an annual budget.

Process Overview:

- Check the website for your annual budget (About > Budget)
- Submit a pre-approval form for your event(s)
- The Financial Secretary/Comptroller will review the request
- You will receive an Orange Tracker email update with approval/denial with comments
- Once approved, feel free to start spending approved funds on the event.

Annual Budget

Reminder: we operate on **reimbursements-only**.

Once an expense has been made, you can get it reimbursed (again, it has to have been already approved!).

There are always exceptions...

- The \$\$ amount (Contracts etc.)
- The vendor (SU Catering, Inn Complete - GSO pay directly)

Special Programming

- All organizations may apply
- Purpose is to supplement existing budget or hold large scale events (as large as COVID-19 allows...)
- Funding is provided per a specific event or activity
- May be used to supplement an annual budget
- Detailed applications that show multiple sources of funding are best
- One request per semester; multiple events per request as needed

Special Programming

Process Overview:

- Submit a Special Programming application for your event(s)
 - There are deadlines for this every month (website)
- The GSO Finance Committee reviews the request
 - The committee meets a week after the deadline
 - You will be invited to this meeting to address any questions
- The Finance Committee makes a recommendation to the GSO Senate
 - These are held a week after the finance committee meeting
- The Senate then debates and votes on it
- **Requests must be received by the deadline posted on the GSO website to be considered**

Start-Up Funds

- Only newly registered organizations (after the semester has started) may apply
- Funding provided for the remainder of the fiscal year
 - GSO fiscal year runs commencement to commencement
 - SU fiscal year runs July 1 to June 30
- Designed to assist new organizations after the budget has been passed by the GSO Senate

Start-Up Funds

The process and application works like a special programming application.

- You will be invited to send a member (or more) of your group to the Finance Committee meeting, so the Committee can ask any questions they may have on your application
- If funding is approved, you will still need to submit a pre-approval and follow all of the other deadlines

SP & SU Applications

- If funding is approved, you will treat this as a new budget or as a supplement to your current budget. You still need to submit pre-approvals before you spend, and follow all of the other deadlines for reimbursement etc..
- **You will not be reimbursed for any amount over what you have been approved for, so keep that in mind when estimating costs!**

Fundraising

- Must be approved by the Grad School (form on the GSO website under “Financial Forms”)
- Plan and notify well in advance – **MUST meet with the comptroller & Graduate School to determine if this can be done for your group.**
 - Many items cannot be sold, so be flexible
 - The Grad School will help lead your organization through tax and health safety issues
 - The Grad School will hold all monies raised
- Ticketed events can have tickets sold through Schine Box Office

Reimbursements

Types & Procedures

General Reimbursement

- We need copies of **ORIGINAL, ITEMIZED** receipts/invoices! [Given the pandemic, you can submit all receipts and forms electronically in one email to \[gsocomptroller@syr.edu\]\(mailto:gsocomptroller@syr.edu\).](#)
- Invoices must state the final amount, not estimate, must have a purchase order number
- Invoices must be accompanied by proof of payment
- ***We cannot reimburse for sales tax on food/groceries***
- We cannot give out tax exempt forms
 - If you pay for something and pay sales tax, you will eat the cost of the tax
- Reimbursement forms will only be accepted if they are submitted by officers who have completed officer training. So, if a member of your organization needs to be reimbursed, you must fill out the paperwork for them!

Reimbursement to SU grad/faculty/employee

- Must be submitted within 30 days of the event
- 3 requirements:
 - Standard Reimbursement form
 - Employee Expense Reimbursement Form
 - All original/copies of original, itemized receipts
 - [Given the pandemic, you can submit all documents electronically in one email to gsocomptroller@syr.edu.](mailto:gsocomptroller@syr.edu)
- Payment should come in 2-6 weeks.
- Make sure the person has non-payroll direct deposit set up (via MySlice).
- We can only pay current SU students/staff

Receipts

- Tape all receipts to a blank sheet of paper
- Copies will not be accepted (contact Comptroller as needed)

Employee Expense Reimbursement Form

- Please, fill this out in Excel and then print it!
- MUST include a purpose of the cost
- Each receipt gets its own line
- MUST be filled out by you
- MUST be signed by the person receiving the reimbursement AND a supervisor
- Supervisors:
 - Your group advisor
 - Chair of your department
 - Department secretary
 - Your advisor

Employee Expense Reimbursement Form

Excel File Edit View Insert Format Tools Data Window Help

Employee-Expense-Reimbursement-Request-2.xls

Search in Sheet

Home Layout Tables Charts SmartArt Formulas Data Review

Font: Arial, 10, Bold, Italic, Underline, Color, Background Color, Text Color, Text Alignment, Orientation, Indentation, Line and Paragraph Spacing, Bullets and Numbering, Styles, Conditional Formatting, Insert, Delete, Format, Themes, Quick Styles

A17

Syracuse University

Employee Expense Reimbursement Request
For reimbursement of an employee's out-of-pocket expenses.

SU ID # 9999999

Employee Name John Deere

Campus Dept Earth Science

Campus Address 204 Heroy Geology Lab

Prepared By Sarah Ledford

Ext #

Voucher #

Date 7/7/14

Employee Signature

Supervisor Name (Print) Jane Doe

Supervisor Signature

Tabbing from white box to white box is the best way to navigate this form

Date	Business Purposes of Reimbursement	Amount
7/1/14	Food for 4th of July celebration	9.99
7/3/14	Hotel for speaker	140.00

Remove any tax from the receipt total

Reimbursement

Normal View Ready

Sum = 0

Taskbar: Safari, iTunes, Photos, iCal, Mail, Calendar, Firefox, Chrome, Word, Excel, PowerPoint, Outlook, OneDrive, Dropbox, Google Drive, etc.

Reimbursing Departments

- Need to be sent to the GSO within 60 days
- Fill out a Standard Reimbursement form as above, but include the chartstring number (get this from the department secretary)
- Submit copies of all invoices/receipts
 - Department will have had to submit the originals already
- Submit copies of the journal entries or general ledger for the expenses.

Paying a Speaker

- Easiest to pay a speaker directly through a department and then have us reimburse the department
- If we are paying them, we will only do so after the event
- Required forms for all reimbursements:
 - Standard Reimbursement Form
 - **ORIGINAL, SIGNED** W9 if this person has never been paid by SU before. Copies are not ok!
 - Non-SU Personnel Worksheet
- If receiving honorarium:
 - Request for payment of professional services by non-employees form
- If receiving travel
 - Travel expense form and travel voucher form
 - ALL ORIGINAL RECEIPTS from the speaker for travel costs!

Non-SU Personnel Worksheet

- Link is on the Payment for Speaker's page, under "Financial Forms"
- You can just email the comptroller or financial secretary a copy of the completed form

Request for payment of Professional Services by Non-Employees Form

Firefox File Edit View History Bookmarks Tools Window Help


Req-for-Payment-of-Prof...

gradorg.syr.edu/wp-content/uploads/2012/08/Req-for-Payment-of-Prof-Svcs-by-Non-Employees.pdf

This PDF document contains forms. The filling of form fields is not supported.

Open With Different Viewer

Page: 1 of 1 110%

 **SYRACUSE UNIVERSITY**
Request for Payment of Professional
Services Rendered by Non-Employees

Voucher Number _____

PERSONAL INFORMATION

Name of Individual Performing Service: _____ Social Security Number: _____

Check Appropriate Status: US Citizen, ☐ Permanent Resident, ☐ or Non-Resident Alien ☐

IF NON-RESIDENT ALIEN: Visa type _____

Country of Residence _____

Permanent Home Address: _____

City _____ State _____ Zip _____

Individual's Business Affiliation (College, Corporation, Etc.): _____

Send Check To
☐ Individual as Shown ☐ Campus Address Below:
Attn: _____

Campus

PAYMENT INFORMATION

Nature of _____

Speaker Info

Paying for Food

- Catered events are limited to 50 students (Fall 2020)
- You are advised to use Food Services for Catering
 - <https://foodservices.syr.edu/wp-content/uploads/Freshly-packaged.pdf>
- GSO receives a 25% discount on Food Service orders that are delivered or are basic receptions. *It does not apply to staffed events*
- If you go through your department, you may not get the discount
- Orders must be placed through the GSO at least 14 days in advance
 - You submit a catering request through the GSO website upon even approval.
- GSO pays for these expenses directly

Other Reimbursements/Payments

- Talk to the Comptroller first to arrange payment
- We can sometimes pay in advance
- We can sometimes pay outside companies directly
- In all cases, we need lots of lead time

Paperwork Headaches

- Gift Cards- can't reimburse for them
- Gifts and prizes- can't reimburse for them
- Alcohol is ONLY allowed if there is a certified server present
- Gas will no longer be reimbursed unless a University vehicle was used. Instead, IRS mileage will be reimbursed. Note: this ends up benefiting us!
 - \$0.575/mile

Important Dates

- Applications for Start Up Funds, Special Programming must be received 2 weeks before the next Senate meeting or they will not be heard until the following Senate meeting

Contact Info

- gso.syr.edu
- GSO mailbox: in Lyman 304
- GSO Office: Lyman 303

- **Mir Hashemi**, President
GSOPresident@syr.edu
- **Yousr Dhaouadi**, Comptroller
GSOComptroller@syr.edu
- **Mackenzie Ess**, Internal Vice-President
GSOInternalVP@syr.edu
- **Jessica Montgomery**, External Vice-President
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