Auditing Procedure

1. Almost all files are in the “**Auditor” folder** in the RUSA Allocations drive.
2. Open the spreadsheet **“Clubs to audit- Fall 2021”** and look at the sheet “**Auditing Assignments”** to see which clubs you are responsible for.
3. We are aiming to audit 2 clubs per week each. Use any random number generator to determine which exact 2 clubs you will be auditing from the clubs you are assigned.
4. Use the spreadsheet **“Clubs to audit- Fall 2021”** to find out who the president, treasurer, and advisor of the club are by looking at the sheet titled **“RegistrationSubmissions-1.”**
5. Open the document **“RUSA Audit document”** to see the script that you will send in an email to the organization. Follow the format/structure mentioned in the document. Copy the script starting from ‘to” to a new email which should be sent from the RUSA Allocations email. Make sure to send the email to the club, president, treasurer, and you can cc the advisor for that club as well.
6. Next reply to this email you just sent and ask the organization what dates and times the president and treasurer have available for that week to set up a zoom meeting to go over the auditing process. Try to send this email by Monday so that clubs have enough time to respond and block out time to meet that week.
7. Prior to meeting with both individuals, look through the club's Sabo account by accessing the Sabo website and past budget applications which can be found in the drive. Try to see if there are any discrepancies or if the club purchased anything that is not approved.
8. When meeting with the officers bring up these discrepancies, if any, and make sure to take notes throughout the meeting from the RUSA Allocations email. Ask the club members how they are doing, if they have any questions, whether they have read the funding guidelines, and if there is anything else they would like us to know.
9. Inform the treasurer that they must send you a breakdown of how funds we allocated them were spent for the current semester and the previous one. For example, how funds were spent for both events we funded in fall 2020 and spring 2021(if applicable). The breakdown can be simple and can be done through Excel.This needs to be sent to us within five business days of the meeting. Once the meeting is done you can add your notes to the “**Auditor”** folder.
10. Inform the club that once you receive the breakdown you will get back to them within five business days about finalizing the auditing process.
11. After you have received the breakdown check to see if there are any discrepancies or if more documentation is needed(rare). If you have any questions feel free to let me know or ask the club.
12. If all the data matches up then you can send an email to the president, treasurer, and advisor saying that the auditing process is finished and everything looks good. Thank the club for their time and assure them that we are here to answer any questions they may have.
13. Make sure to check the club off on the **“Clubs to audit- Fall 2021”** spreadsheet as “done” and add any notes such as “all data checks” or “had follow up questions.”
14. Add all documents collected from the club and your notes to the **“Auditor”** folder and be sure that everything is labeled appropriately.
15. Feel free to ask me any questions throughout the process to assure that everything runs smoothly!

Email Credentials:  
Email: [RUSA.Allocations@gmail.com](mailto:RUSA.Allocations@gmail.com)

Password: imissbrian

Sabo Account Credentials:

Netid and password

Funding Guidelines:  
<https://a7501ae6-d637-4422-a801-e23fe1e6e394.filesusr.com/ugd/16dfc3_233ce31ae1ee4665937630f24cfabdfa.pdf>

Other info:

Auditor - Kobi Lee

Deputy Auditor - Stephanie Wu

Deputy Auditor - Ethan Nguyen

Deputy Auditor - Jade Bilis

Deputy Auditor - Pranav Anil

Monday initial email to the club account and cc the primary officer(president), treasurer, and advisor

Wednesday 6 pm if no response then send follow up email as a reminder

If no response to the follow up email by Friday noon then call them