

Clubs Cheat Sheet

Finance Certification You must be financially certified to do any financial transaction. We recommend that at least 2 club members be certified. To become certified, please go to the Clubs website at <http://clubs.rit.edu>. On the right hand side of the page click on the finance certification and you will find a quick PowerPoint presentation followed by a quiz. If you pass the quiz with a score of 75 you will become financial certified. If you pass, you will automatically be added to our list. Once certified you can do any financial transaction using the Expense Approval Form (EAF).

Expense Approval Form (EAF): This must be completed and signed by your club's advisor. These are the things the EAF allows you to do and how to accomplish this:

- Bring the filled out EAF when you meet with Carol Giuliano or Dawn Rizzo for:
 - Credit card purchase
 - Travel arrangements
- For any other request except credit card or travel, drop the completed EAF off at the Club Resource Center allowing 3 days turnaround for most of the following requests:
 - **Cash Advance**
 - Money for cash box
 - Local entry fees for events, or races, etc when credit cards are not accepted. Must bring back a receipt.
 - **Reimbursements**
 - Attach receipts
 - No tax will be reimbursed
 - These should only be for purchases that were last minute and could not take out the credit card
 - Over \$200 will have to be an electronic reimbursement
 - **Check Request** –Please allow 5-10 working days (in busy spring quarter it will probably be longer)
 - Attach back up paperwork, receipts and W-9 when necessary
 - Students requesting over \$200 reimbursement will need to receive an electronic check.
 - **HUB Request**
 - Attach copy of item to be copied
 - Will place paperwork in your club folder that you can take to the HUB
 - If you want to take advantage of the 175 free black/white copies, please indicate on your EAF
 - **Officemax/Staple**
 - Fill out the order form and hand in at the desk with the EAF
 - Once order is placed, it will come in the next day and there will not be any shipping charges

Travel

- Please make an appointment with Dawn Rizzo at the Club Resource Center for hotels, airfare, and buses:
 - Bring the EAF to your meeting
 - Must be EVR's before meeting
 - You may reserve a hotel with your credit card and at your appointment it will be replaced by RIT's credit card.
 - Airfare
 - Do not purchase any tickets until meeting
 - Please bring the name of each person as it appears on the ID they will be using
 - Each student's complete birth date including month, date and year
 - Buses
 - Please have number of students, dates and destination

Fundraising

- **There are 2 forms used to deposit money:**
 - Deposit form
 - Money collected for/at events
 - Dues collected
 - Donations from individuals and companies
 - Matching form –The matching part will be given in the fall of next fiscal year
 - Must be from a current student
 - Checks must be from the student's checking account, not a parent's, etc.
 - The only memo filled in should say 'donation'
 - Each student must fill out the matching form completely
 - There is a maximum of \$100 per student, per academic year
- **Additional Award from Student Government**
 - If travel is involved:
 - EVR event, a request will automatically go to the Finance Director directly. She will set up an appointment with you during one of the Finance Committee meetings where you can answer questions
 - Please make sure you indicate on the EVR that you are requesting additional funding and the expenses. If the Finance Committee makes the decision to help your club, the most they will give is 50% of travel expenses. You will need to convince Student Government that this event is a benefit for RIT as a whole and not just for an individual student(s)
 - If no travel:
 - Fill out the Additional Award form that can be found in the Student Government office
 - Take to the Student Government office. You will be contacted with an invitation to a Finance Committee meeting to present your request

- **Departmental Support** - Ask for help from Departments/Colleges. If they agree please have them contact Merry Schading at mlw0137@rit.edu and an internal transfer can be arranged
- **Contact Alumni**
 - Contact Angele Vellake, Assistant Director, Student and Recent Alumni Giving at angele.vellake@rit.edu, for help reaching out to alumni. She will help with emails and mailings
- **Free Giveaways**
 - Angele Vellake, also has items that can be given away as a thank you at no cost to the club. These would be used as a thank you for donations given to clubs. (Example: if you set up a table in the SAU you would be able to use these free give-aways when someone donates to you club)
- **ROAR Day** – 10/13 Please take advantage of this day when everyone including faculty, staff and students, on campus is asked to donate.
- **Tokens** – When clubs do financial transactions correctly, from beginning to end, your club will receive a token. When you collect 10 tokens, please submit them to the Club Resource Center and we will place \$20.00 into your account

Budgets

- Budgets will be due for the next fiscal year on Friday, April 4
- Only Tier 2 and Tier 3 need to apply for a budget
- If you are a Tier 1 and would like to request a change to Tier 2, you will need to turn in a budget along with a letter asking to become a Tier 2 and why you feel your club should receive a budget
- Training will be on:
 - 3/12, 6-7:30 in the Bamboo Room located on the second floor of the Campus Center
 - 4/3, 6-7:30 in the Bamboo Room located on the second floor of the Campus Center
 - You may also make appointments with Carol Giuliano or Merry Schading for help with your Clubs budgets or if you would like to review them before submitting.

PLEASE DO NOT:

- **Sign Contracts** – Only Ryan Giglia can sign contracts for clubs. If you have a contract that you need to have signed, please see Ryan. If you have a performer who is coming to RIT, when you EVR your event a contract will be drawn up automatically and sent to the performer through EVR. You do not need to bring this contract request to Ryan but to the Contract Desk located in the Campus Center.
- **Place orders** for items with your club logo. Your logo or design needs to be okayed by Sarah Griffith before you can proceed with your purchase. Also, contact Carol Giuliano if you would like to order t-shirts, uniforms, etc so that we can go over the proper procedure.
- **Go over budget** – Remember, when spending do not let you club go into deficit.