

Center for **Student Involvement**

# STUDENT ORGANIZATION HANDBOOK



Center for Student Involvement  
UNIVERSITY OF COLORADO **BOULDER**

**Be Boulder.**

 University of Colorado **Boulder**

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# | WELCOME |

## INTRODUCTION TO THE CENTER FOR STUDENT INVOLVEMENT

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Thank you for your interest in getting involved on campus! The Center for Student Involvement (CSI) is a service department of the University of Colorado Boulder Student Government (CUSG) within the Division of Student Affairs. We cultivate an environment for building vibrant, engaging and safe communities through programming, leadership development, cultural awareness and learning opportunities. We believe that it is important to get involved on campus and that it will enhance your college experience.

CSI has a variety of resources and programs to support you during your time at the University of Colorado Boulder. We hope that this handbook will provide you with the information you need to get involved. There are plenty of ways to get involved, and we hope that you find the one that works best for you. If you have any questions, don't hesitate to stop in to our office or reach out through our website, social media or email.

CSI is located in the University Memorial Center (UMC), room 330. Our office hours are from 8am-5pm during the school year and 7:30am-4:30pm in the summer. Our website is [www.colorado.edu/involvement](http://www.colorado.edu/involvement) where you can chat with one of our staff members during normal business hours. Additionally you can find us on social media platforms or email [involvement@colorado.edu](mailto:involvement@colorado.edu).

## PURPOSE

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The purpose of CSI is to provide programs, events, and student organization services that give students opportunities to develop as individuals and create connections to the campus community. At the University of Colorado Boulder, we believe that the most viable way for our students to engage in university life is to become involved with student organizations. In CSI, we firmly believe that properly managed and supported Recognized Student Organizations (RSO) and Recognized Social Greek Organizations (RSGO) can create an effective learning environment that prepares our students to live in a multi-cultural society and to work in a global community. Student Organizations serve as a medium for academic discourse, personal growth, leadership development, intercultural understanding, community service, and lasting friendships.

Research on the benefits of student organization membership suggests that involved students tend to perform better academically and are more likely to graduate than their non-involved peers. Students involved in organizations composed of peers learn leadership and interpersonal skills, as well as life skills such as planning, time management, and budgeting. Involved students develop a more robust, supportive network of friends and colleagues that often lasts beyond their college years.

## CSI GUIDING PRINCIPLE & CORE VALUES

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### **Guiding Principle**

We strive to provide opportunities where every student can find their passion and place.

### **Core Values**

Student Development Orientation – We view every interaction we have with students as a potential learning opportunity

Student Focused – We keep the students' needs central to what we do

Inclusion – We work to build a department that values each individual's unique identity so that everyone feels welcome and supported when they interact with us and our programs

Fun – We believe in bringing joy and laughter into everything we do

Adaptability – We creatively innovate in a constantly changing environment

## CSI BOARD

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CSI Board is an Advisory Board for the Center for Student Involvement. The members of the board work with CSI to ensure it fulfills its mission of providing programs, facilities, and educational opportunities to enrich the campus experience. The board provides direction for the office and reviews CSI Policies and budgets.

Students can apply to be on the board by going to

<https://www.colorado.edu/involvement/about/csi-board> or they can go to any of our meetings and speak at the open forum at the beginning on each meeting.

# | BUFFCONNECT |

## BUFFCONNECT

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In July 2017, the Center for Student Involvement introduced a new online management platform for student organizations called BuffConnect. BuffConnect is a centralized system in which student organizations are able to manage their operations. Each RSO receives a customizable portal. Certain information from the portal is included on the student organization public directory and more detailed information about the organization is accessible to students by logging into BuffConnect using their identkey. While BuffConnect has a variety of functions and tools available for student organizations to use, there are number of RSO operations that must be completed through BuffConnect. They are as follows:

- Completing an annual agreement for existing RSOs.
- Completing a new RSO registration
- Completing the online Signer training
- Editing RSO profile information such as:
  - Adding and removing Signers
  - Adding and removing Porta Administrators
  - Requesting a RSO email account
  - Requesting a RSO email account password reset
  - Requesting a RSO name change
- Submitting funding requests
- Submitting payment requests
- Requesting cash boxes
- Submitting printing requests through the Resource Center

# | ORGANIZATION RECOGNITION |

## RECOGNITION OVERVIEW

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CSI is responsible for managing student organizations on campus, including annual registration, policy and procedure enforcement, financial management, and other operational considerations. There are two types of student organizations recognized by CU Boulder: Recognized Student Organizations (RSO) and Recognized Social Greek Organizations (RSGO).

## DEFINITIONS

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### **Recognized Social Greek Organizations (RSGOs)**

RSGOs are a separate classification of student organization, where the organization, due to the 1972 Amendments to Title IX, can restrict membership based upon sex. RSGOs are often associated with national chapters and affiliated with a local governing body of organizations. They are also recognized by the University, such as the Panhellenic Council and the Multicultural Greek Council. RSGOs have additional rules, policies, and procedures to become recognized and remain in good standing with CSI and the University.

### **Recognized Student Organizations (RSOs)**

RSOs are general student organizations recognized by CSI and the University. RSOs must be open to all students and may not discriminate based on the protected classes enumerated in the University's Discrimination and Harassment Policy, found here:

<http://www.colorado.edu/policies/discrimination-and-harassment-policy-and-procedures>

### **Recognition of RSOs**

To be recognized by CSI and receive the privileges and benefits as designated below, the organization must:

- Complete the RSO annual agreement by the designated due date, which must be approved by the Director of CSI or designee
- A student member of the organization (preferably a student organization signer or other organization leader) must attend an annual in-person training within 60 days of creating a new organization or by the annual RSO Agreement renewal deadline
- A student organization must have at least three members and two thirds of membership must be fee-paying University of Colorado students.
- At least one, but no more than three, student member(s) must be designated as a signer and the signer must successfully complete signer specific training offered through CSI. The definition and requirements of a Signer are provided in a later section.

Student organizations are subject to all University policies. An additional set of policies and procedures also govern RSGOs per Title IX compliance, legal and risk management considerations, and national organization chapter affiliations. New organizations which are

believed to fall into this category must work directly with the Assistant Director of Greek Life or designee.

## ORGANIZATION STANDING

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Student organizations can be placed in one of four standings based upon meeting obligations to the University and CSI. The following definitions apply to student organization standing:

### **Good standing**

Organizations in good standing are considered active organizations with all privileges they gain by being recognized officially by the University. To remain in good standing an organization must comply with all University regulations, student fee regulations, abide by all terms established in the annual student organization agreement, and CSI policies. This includes all those enumerated herein as well as ensuring all outstanding debts are paid to service providers on time, including both on-campus and off-campus entities, and following all policies and regulations around brand and logo use, as determined by CU Strategic Relations.

### **Bad standing**

Organizations in bad standing have not met at least one of the obligations to the University or have been found in violation of student organization policy. These organizations access to the privileges granted organizations in good standing are suspended, including but not limited to being listed on the University's public directory, reserving campus space, hosting or sponsoring events, having access to campus funding and fundraising opportunities, or having access to the organizations operational (main) account with the University. Violations of any campus or CSI policies in regard to student organizations could result in the organization being placed in either permanent or temporary bad standing. This decision will be made at the discretion of the CSI Director and is subject to appeal.

### **Probation**

Student Organizations may be put on probation by the Director of CSI or designee for activities that knowingly undermine CSI policy and are contrary to the purpose of student organizations including, but not limited to:

- Misrepresenting the mission, purpose, or activities of the organization to CSI, other staff or departments within the University, or to outside entities
- Unethical, destructive, or inappropriate use of University funds and resources, including spending funds for purposes other than that for which they were intended
- Using student organization privileges for the personal gain of an individual or entity, whether or not they are a member of the organization
- Violations of the student code of conduct while representing a student organization or at a student organization function

Organizations on probation may lose the ability to apply for or spend Student Fee Funding and may lose the right to occupy or apply for storage space issued by the CSI Board for the duration of the probationary period. Additionally, if the organization in question occupies office or

storage space out of CSI controlled areas, the UMC Board will be informed about the probationary status of the organization. Organizations found to commit a second violation while on probation, or committing three violations within a three-year period will be put in bad standing and will no longer be able to operate as a student organization.

### **Inactive status**

Organizations who have not submitted an annual agreement during or between the previous two agreement periods will be placed in inactive status. Those privileges which were previously suspended will be revoked, email accounts and websites will be inactivated and any funds in the organizations main account will be moved to a holding account maintained by CSI.

Student organizations that become either in bad standing or inactive with CSI have the potential to get back into good standing, depending on the nature of their change in status, by remedying the policy violation or completing the necessary requirements. Organizations should contact CSI directly to determine the appropriate course of action.

## **STAFF SUPPORT & ORGANIZATIONAL THEMES**

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In order to provide support and guidance to all RSOs and RSGOs, CSI staff members have been identified to work as liaisons based upon the organization's self-selected theme. Liaisons are also responsible for signing off on and sending any funding requests for student organizations to the appropriate funding sources through BuffConnect. It is the responsibility of the student organization to meet with a CSI liaison prior to registering as a new organization, submitting any funding requests, or planning any major on-campus event or off-campus travel. It is encouraged that student organizations make appointments to meet with their assigned liaison, however, during regular business hours (Monday-Friday, 8am-5pm) 1-2 liaisons are always available for drop-in appointments or on the CSI website's live chat feature.

A list of liaisons by category can be found at <https://www.colorado.edu/involvement/student-organizations/liaison-staff>

## **HOW TO REGISTER A NEW ORGANIZATION**

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To start a new student organization, a group of students must first meet with a CSI liaison staff member to discuss the processes and rules that govern student organizations. To create a new student organization, there must be a minimum of three initial student members. At all times, two-thirds of an organizations membership must be full-time fee-paying students. Only full-time, fee-paying students may initiate the creation of a student organization. Once the organization has met with a CSI staff member, they will be instructed on next steps in the new organization creation process. Steps in the process include completing the RSO registration and agreement through BuffConnect and attending an in-person training.

<https://www.colorado.edu/involvement/new>

## HOW TO RENEW

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Current student organizations must renew their agreement with CSI annually. The period to renew agreements will begin annually at the start of the new fiscal year on July 1. To remain in good standing, organizations must submit a new agreement and attend an in-person training by September 30 of each year.

If organizations have not completed the annual renewal requirements by September 30, they will be placed in bad standing (see definition above), any currently held space reservations will be dropped, and they will not be able to apply for funding. Only current signers for an organization can submit the annual agreement. If an existing organization wishes to renew outside of the defined dates above, they must meet with a CSI liaison for permission and approval. If granted approval, once the student organization submits an updated agreement, they have 60 days to complete an in-person training in order to be placed back into good standing.

<https://www.colorado.edu/involvement/existing>

## REVIEWING & APPROVING STUDENT ORGANIZATION AGREEMENTS

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The primary mission or activity of a student organization must be centered on, for the benefit of, and driven/completed by University of Colorado Boulder students. The following items may prevent or delay an agreement from approval:

- Agreements proposing to start an organization which does not meet the requirements/definition of a Student Organization as spelled out in CUSG Student Fee Regulations (SFRs) and CSI policy will not be accepted.
- Those Agreements that are incomplete, contain conflicting or inaccurate information, or do not fully address the questions asked therein, will be returned for review and revision.
- Agreements that have the same mission or purpose of an existing organization may require further review to determine the necessity of an additional organization so closely aligned with one already approved.
- Agreements that appear to be passing off a third party or other entity as a student organization, are for the purpose of creating or representing other organizations, are for the purpose of accessing funding on behalf of another student organization, or are for the personal or academic gain of individual members or persons will not be approved.

# | POSITIONS & RESPONSIBILITIES |

## SIGNER RESPONSIBILITIES

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Students recognized as signers for their organizations are those individuals authorized to make reservations, submit funding requests, access and direct the use of organizational funds, and are responsible for communicating with the CSI office and keeping the organization in good standing. When a new student organization is formed, signers are designated as part of the organization creation process. After that, signers can be updated (added or removed) in one of three ways: by being added or removed by a current signer through a form on the organization's BuffConnect portal, through a communication to a CSI student organization liaison from the organization's advisor of record as listed in the organization's record with CSI, or through a valid election coordinated and/or administered by CSI staff to document signers chosen by vote of current organization members (only those elections necessary to select signers when no current signers exist require the involvement of CSI staff). Once requested as a Signer, students will receive an online training through BuffConnect that must be completed in order to be officially added as a Signer. Students will not be listed as Signers until this training is completed.

The following stipulations govern student organization signers:

- Student organizations must have at least one student signer and may have up to three signers per organization.
- Only fully enrolled CU students, as confirmed through CU-Student Integrated Systems (CU-SIS), may be signers for student organizations.
- Individual signers' enrollment status will be verified whenever they are added to a student organization account
- All signers' enrollment status will be verified twice annually, within 30 days of the annual agreement due date in the fall semester and within 30 days of the add/drop deadline in the spring semester
- If student organization signers are found to not be fully enrolled students, they will be removed as signers for the student organization
- Signers must use a University of Colorado email address as their primary email for communication purposes.
- If removing a signer causes an organization to not have any fully enrolled students listed as signers, the organization will be placed in bad standing until a fully enrolled CU student becomes a signer (see valid methods of updating signers above)
- Students cannot be signers for multiple organizations. In the event a student is a signer for one organization and wants to be a signer for another, they must remove themselves or have themselves removed from the first organization before being added as a signer for the second.
- Only organization signers can submit funding requests for organizations.
- Elected CUSG officials may not be signers on any student group account.

- Only organization signers can request the use of organization fund for the purposes of purchasing directly or reimbursing others for the payment of organization expenses, or otherwise make financial commitments for the organization.

### PORTAL ADMINISTRATORS RESPONSIBILITIES

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Student organizations are required to have at least one member designated as a Portal Administrator for the organization's BuffConnect portal. This position has the ability to access and edit any content for the organization's portal which may include creating, editing, and deleting events, adding and deleting members, and editing profile information that is displayed on the public directory. Organizations may designate any student member they wish for this position though the Center for Student Involvement recommends this position be held by

### TRAINING RESPONSIBILITIES

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At least one member of an organization must attend an annual organization training within the established CSI time period. It is strongly preferred that either student organization signers or other organization leaders attend, however any organization member can fulfill this requirement. Students can only attend the training on behalf of one student organization. Training completion will be tracked by attendance taken at the trainings through students self-identifying the organizations they are representing. After the last scheduled annual training, any organizations in good standing from the previous fiscal year who have not attended an annual training will be placed in bad standing and have the change of status communicated to the appropriate campus partners. After the last of the annual trainings has occurred in the fall semester, organizations will be able to receive the training credit by attending one of the regularly scheduled, monthly new student organization orientations.

## | PRIVILEGES & BENEFITS |

Student organizations in good standing are given the following privileges and benefits of being officially recognized by CSI:

- The ability to apply for and gain access to funding from a variety of University funding sources including CUSG funding boards for approved activities and travel
- Utilization of an organization specific BuffConnect Portal
- Access to free or reduced rates for space on campus to conduct meetings, activities, and events
- Fundraising opportunities including, but not limited to, hosting on-campus event, loggia table sponsorships, and CU-supported crowdfunding
- Support from an assigned CSI Liaison to help with budgeting, event planning, and organizational management
- Access to a financial account held in the CU Finance system and support of CSI staff who facilitate the use and management of organizational funds
- Access to the CSI Student Organization Resource Center
- Ability to market for events using on campus space and resources
- Office /locker space within the University Memorial Center (UMC) through the space allocation process governed by the UMC and CSI Boards (availability is limited)
- An official CU email address that will be used as the primary method of electronic communication with student organizations
- Organizations are encouraged, but not required, to seek faculty/staff advisors, as they can provide organizations valuable guidance and support. For those organizations who choose to have an advisor of record who is either a faculty or staff member at CU Boulder, access to a Colorado.edu website, hosted on University servers, using the WebExpress platform will be made available
- The use of CU name, logos, and branding. For more information on student organization branding, visit <https://www.colorado.edu/brand/how-use/logos/student-organizations>

## | LIMITATIONS |

In accordance with the annual student organization agreement, student organizations in good standing have the following limitations. Student organizations do not have:

- Access to the university procurement center. Student organizations are not eligible for university procurement cards.
- Access to university counsel. As third parties of the university, student organizations are responsible for their own legal matters and are not considered eligible to receive legal advice from university counsel. Additionally, staff and faculty serving as advisors to student organizations may not be eligible to access university counsel within their capacity as an advisor on behalf of the student organization.
- Access to university payroll and benefits services. Student organizations may not hire or employ individuals to work for the organization.
- Access to the university's tax-exempt or government status. Student organizations cannot use the university's tax-exempt status for their operations.
- Coverage through the university liability insurance. Student organizations are considered "at CU" not "of CU" and as such, are not covered under the university's liability insurance. Additionally, staff and faculty serving as advisors may not be eligible under liability insurance when serving in their advisor capacity.

# | ORGANIZATION MANAGEMENT |

## TRAINING OPPORTUNITIES

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The Center for Student Involvement Office offers a variety of training and development opportunities for students and student organizations to gain valuable skills related to a variety of topics, including campus resources, personal development, leadership development, and interpersonal skills. Some of our training and development opportunities include:

### **New RSO Orientation**

All new Recognized Student Organizations are required to attend an in-person orientation. This orientation must be attended within 60 days of the approval of your organization agreement to become in full good standing. Learn more and register for this orientation session on BuffConnect.

### **Annual RSO Training**

All preexisting Recognized Student Organizations will be required to attend an in-person training to remain in good standing for the academic year. To satisfy this requirement, at least one member of the RSO must attend the entire training session. There are several dates throughout the first few months of the semester, so pick the date that works for you of the BuffConnect events calendar.

### **Student Organization Summits**

This series of informative workshops was created to better train and support CU student organizations and the leaders of these organizations. Learn more information about Student Organization Summits.

### **Pinterest & Popcorn**

This ongoing workshop series in the Resource Center features craft projects, hands-on workshops, snacks, and a chance for you to socialize with other student organization members.

### **BuffConnect Basics**

In July 2017, the Center for Student Involvement introduced a new online student organization management platform called BuffConnect. This monthly webinar series provided in-depth training of various portal functions student organizations can access.

### **Workshops in a Box**

Are you interested in learning valuable interpersonal skills and growing as a leader? CU GOLD is the only free and open leadership program on campus. CU GOLD offer Workshops in a Box, customizable workshops designed with student organizations in mind. CU GOLD staff will bring the workshop to the organization and handle the facilitation with no cost to the organization.

## Additional Training

In addition to the above trainings, many of the CSI staff members are experienced trainers and facilitators in many areas, including organization development, issues of diversity and inclusion, and more. Several CSI staff members are also trained facilitators for a variety of personality inventories, including: Myers-Briggs Type Indicator (MBTI), Strengths, and Real Colors. If you are interested in any of these trainings, please feel free to stop by UMC 330 to talk to a staff member or email [studentorganizations@colorado.edu](mailto:studentorganizations@colorado.edu).

## MEETING MANAGEMENT

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Meetings are essential to communication between student organization members and the overall development of an organization. Creating a meeting agenda, prioritizing tasks and managing time are important steps to successfully managing a meeting. We encourage you to think about the 4 P's when planning a meeting:

### Preparedness:

- Who should be in the meeting? Why?
- What information do they need from me (or others) to be prepared?
- By what date should they get the information?

### Purpose:

- Is this meeting important? Why?
- What will people get out of meeting in-person?
- Is a meeting the best way to accomplish what needs to be accomplished?

### Process:

- How will we accomplish what needs to be accomplished at the meeting?
- How will the meeting time be maximized?
- How can everyone at the meeting feel valued and important?

### Payoff:

- How does this meeting payoff for others?
- How does this meeting payoff for the organization?
- How does this meeting payoff for me?

## MINUTES AND RECORDS

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Accurate minutes and records are important to the ongoing success and year to year continuity of a student organization. Meeting minutes are often referred to by members as a reminder of finished and unfinished business, what actions or next steps were taken and what still needs to be completed. Minutes and records also provide future organization members and leaders with insight into past decisions and events. It is important that a student organization assign the process of managing minutes and records to a specific position to ensure continuity.

Effective minutes should include:

- The type of meeting (general meeting, executive board meeting, etc.)
- Time, date, and place of the meeting
- Length of the meeting (time meeting begins and ends)
- List of attendances and absences
- Reports from the various members, committees, executive board members, guest speakers, etc.
- General matters
- Summary of discussion, voting, resolutions, motions, or proposals
- List of action items

## ELECTIONS

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When planning the student organization's yearly calendar, it is important to think about the election process of new officers and leaders of the organization. It is recommended that organizations develop a standardized election process that is written in their constitution or bylaws (or both) and is agreed upon by the organization as a whole.

## MEMBERSHIP RECRUITMENT

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Continuing to grow the membership of a student organization is critical to long-term success of the organization. While there are number of avenues in which to market and recruit members on-campus, it is important to remember that first and foremost, successful recruiting comes down to building relationships. The more members seek to get to know and build relationships with potential members, the more welcome potential members feel and the more likely they are to join your organization.

Ideas for recruiting members:

- Schedule interest meetings at peak times of the year
- Participate in the [Be Involved](#) or [Involvement Fair](#)
- Place posters (with approval) around campus to market your organization
- Table in the UMC
- Use the "News post" and "Events" functions of BuffConnect to tell students about your organization and how to get involved

## MEMBERSHIP RETENTION

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Once members join your organization, it is necessary that they stay involved, motivated, and engaged in order for them to stay. Members want to feel valued and like they can contribute to the organization. They want to feel like they are part of a community. Keeping members

engaged starts with transparency. Let members know what is going on with the organization, what they can participate in, and how they can be involved. Some organizations use listservs or newsletters to keep all members up to date with the happenings of the organization.

Additionally, make members feel involved. Create committees and subcommittees where members can feel ownership over tasks and projects. Even if the role is small, the most the member feels their contribution is valuable, the more likely they are to stay involved.

## GOAL SETTING

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An organization without goals has no direction to move it forward. Members in an organization with well-defined goals often have little commitment to the organization. Goals get people involved, motivate them to work on tasks, and give them a sense of accomplishment when they are realized. There are many templates, formats and strategies for setting goals. The biggest thing to remember is that a goal with a plan to achieve that goal is the same as having no goal at all. Below highlight the SMART goal method for goals setting:

SMART = Specific, Measurable, Attainable, Realistic, Tangible

### **Specific:**

- Who is involved?
- What do I want to accomplish?
- Where am I going to do this?
- When will this occur?
- Which parts of the goal are critical?
- Why do I want to accomplish this goal?

### **Measurable:**

- How will I know when the goal is accomplished?

### **Attainable:**

- How is this important to you?

### **Realistic:**

- Goals maybe too high because:
  - Other people may be involved
  - Insufficient information
  - Always expecting your best performance
  - Lack of Respect for self
- Goals maybe too low because:
  - Fear of failure
  - Taking it too easy
- To set goals at the right level you should:
  - Practice, practice, practice
  - Set goals slightly out of your immediate grasp
  - Take personal factors into account
  - Review and adjust

**Tangible:**

- How do I make it real?

**BYLAWS**

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Bylaws are an essential component to running a student organization. A constitution and/or bylaws are a guiding document that explain the operations and activities of an organization. Most funding boards will require student organizations to provide a copy of their bylaws before meeting. More information about how to create bylaws can be found here:

<https://www.colorado.edu/involvement/funding/bylaws>

# | TRANSITION |

## TIPS TO AN EFFECTIVE TRANSITION

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One of the most challenging times for an organization often arise when leadership is in transition. Too often, organization leaders dedicate themselves to successfully leading their groups for an academic year and at the end of their terms, leave the positions without time spent making sure the incoming officers have the opportunity to be trained. When that happens, all the information regarding the previous year's lessons learned are not passed on to the incoming officers, thus slowing down their progress. The following tips will help you effectively transition at the appropriate time:

### **Evaluate Finances**

- Were the finances adequate for your group and managed properly?
- Document key duties and maintain copies of budgets, financial reports, contracts, bank statements, checkbook, copies of paid invoices, etc.

### **Close-out**

- Make sure all contracts, bills, & invoices have been submitted to the appropriate places.
- If any are in process at the time of transition, document noting what is complete/what needs to be done with them.
- To be thorough, create a transition report that documents any yearly spending, future spending needs and any outstanding items.

### **Document**

- Document any problems or disappointments you encountered as a part of your position and suggest ways of avoiding or correcting them.
- What did you try that did not work? Why did it not work? What problems or areas will require attention within the next year?
- Were meetings run effectively? Was their frequency adequate?
- Did the committee structure work?
- Did we have scheduling conflicts with other groups or activities?

### **Meet**

Before the newly elected officers of your organization officially assume their responsibilities, it is wise for the old and new officers to get together for a transition meeting. This opportunity provides continuity and continued growth for the organization while allowing the new officers to learn from the experiences of the outgoing officers.

## REPLACEMENT OF SIGNERS & PORTAL ADMINISTRATORS WITH CSI

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Signers and portal administrators can be updated (added or removed) in one of three ways:

- Being added or removed by a current signer through a form on BuffConnect
- Through a communication to a liaison from the organization's advisor

- Through a valid election coordinated and/or administered by CSI staff to document signers chosen by vote of current organization.

## | FINANCE |

### INTRODUCTION TO FINANCE

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The financial branch of the Center for Student Involvement is available to assist student organizations with a variety of fiscal services. These including managing on-campus accounts for student organizations', providing access to funds distributed by University entities, helping students navigate the University purchasing process, provide information regarding financial best practices, tax implications, and regulations, policies, and laws that apply to student organization financials.

The signer(s) of a student organization are the only members who have access to accessing the various funds available to a student organization. More information regarding the Signer position can be found in the section titled "Positions and Responsibilities." While students are welcome and encouraged to discuss their needs with CSI Finance staff in person, over the phone, or via email, students will make all funding requests through the BuffConnect platform. This serves as both the form approval from the organization to spend their funds, as well as providing the necessary information to complete the specific type of request. It is highly recommended that, after being fully approved for the position in BuffConnect, signers come in to get a virtual tour of the system and learn how signers interact with it.

As is indicated in the Annual RSO Agreement that must be renewed by organizations each year, student organizations have a relationship with the University, but are not considered "part of" the University, and are thereby not covered by University insurance, governmental immunity, tax statuses, legal counsel, and other statuses or privileges afforded to the University. Because of this, we strongly advise organizations discuss their financial activities with CSI finance. While CSI staff are not tax specialist, not financial advisors, they can help organizations be successful in their financial endeavors by offering additional resources, making them aware of potential tax, legal, or other implications, and potentially offer alternative options or solutions.

## | RAISING MONEY & FUNDING |

### FUNDRAISING

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Student organizations have the ability to fundraise both on and off campus. Below highlights a variety of common fundraising options. The following is not a compilation of all policies, laws, etc. that may affect a student organization, but is here to provide guidance for regulations that govern common student organization activities. Please consult CSI Finance for specific guidance.

### COMMON FUNDRAISING OPTIONS

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#### **Sale of goods (things)**

Typical types of items sold include food/ baked goods, t-shirts and other clothing items, books, stickers and other branded materials. Colorado state and local sales tax must be collected and remitted on any sales of tangible goods.

### **Restaurant fundraisers**

Many restaurants will support organizations through events where a portion of sales/ proceeds during a specific period is donated.

### **Volunteering Services**

Some vendors/ business will provide financial support to organizations that provide their time/ labor. Some examples are providing custodial/ clean up services, refereeing, working sporting event concessions, etc.

### **Admission to events/shows/dances**

Your organization can put on an event or performance and sell tickets. If a tangible item, such as a meal or shirt, are given with the purchase of admission sales tax must be remitted for the value of those items. Some venues may charge increased facility fees for events where money is collected. Be sure to ask when book space on campus.

Offering a door prize may encourage people to purchase tickets or allow for a higher ticket prices. It is important to note that a door prize differs from a raffle because they are not buying a ticket for a chance to win the prize, but are purchasing entry into the event, which comes with an equal chance for all attendees to win.

### **Games of skill**

Games of skill include guess the number of jellybeans in the jar, physical competitions, tournaments. Individuals or teams would pay to participate. It is important that a person's potential for winning is not based on random chance but on their skill at that activity as compared to other competitors.

### **Loggia**

All vendors that sell or promote a product on campus must go through a student org in order to reserve space for the activity. The primary location is tabling space within the UMC, through Events Planning and Catering. By "sponsoring" the vendor the student organization receives a portion of the money paid to reserve the space. The number of days a semester a vendor may reserve these tables is limited.

### **Vendor sponsorships**

Orgs can seek out business who may be willing to sponsor their organization. Sponsorship may be simply be financial support, but can also include donations of goods or services, financial support in exchange for logo placement on advertising or uniforms, or other types of arrangements.\*

## **CU Crowdfunding**

Crowdfunding is an online fundraising tool created by the University of Colorado Boulder that allows individuals and organizations to create and share fundraising campaigns with an engaged community.\*\*

### **Raffles\*\*\***

A raffle is a “game of chance” where an individual buys a ticket for a chance to win a prize. Because a person is paying money and may receive nothing in return (if they do not win the raffle) this is considered gambling and is covered by state gaming laws. One must have a license from the Secretary of State’s office to run a raffle and a certified Games Manager must be present. This differs from a giveaway or a door prize because either a person does not pay to be entered to win, or is entered to win in association with a purchase where they are receiving something (like admission to an event). No special licensing or certification is required for this type of event.

## **FUNDRAISING "DISCLAIMERS"**

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\* It is recommended you discuss with CSI Finance any sort of vendor sponsorship before signing anything. While some types of “exchanges” may be seen as a business or marketing expense for the sponsor, others may see it as a donation. “Donations” to your student organization are not donations are generally not tax deductible.

\*\*Crowdfunding is limited to University approved projects, not general operations of the organization, and all funds collected are considered donations to the University in support of the project. The Crowdfunding campaign is open for donation for a limited amount of time and the funds collected can only be spent for the purposes stated in the campaign. Accounts created for the purpose of accepting Crowdfunding cannot be used by the organization for other purposes or other types of fundraising.

\*\*\*Raffles are governed by State Gaming Laws and must be administered by a Games Manager authorized by the Secretary of State with a State Gaming License. Hosting an unlicensed raffle could have hefty fines or legal consequences. See CSI Assistant Director of Finance for more information

## **FINANCIAL CAMPUS POLICIES**

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Any monies collected on campus, or for a campus event, must be deposited into an on campus account. You must arrange to get a cash box from CSI before collecting money, at which time a CSI Finance staff member will discuss how to ensure secure cash handling.

Students are limited to three University approved online credit card vendors when collecting on campus or for a campus event: Eventbrite, RegOnline, and Vendini. Because of the potential liability as well as the method by which funds are deposited, services like Square, PayPal, and Venmo are not currently allowable.

For the full CUUF policy: <https://www.colorado.edu/policies/campus-use-university-facilities>

Student Fee Regulations are the rules that govern how student fee funds are to be used. These will be discussed in a bit more detail later in this section, but it is important to note that no student fee funds can be used, directly or indirectly, toward the purpose of fundraising for a third-party (outside of the University) which includes student organizations. This includes, but is not limited to, purchasing items to sell purchasing items for a fundraising event, or marketing such an event. Additionally student fee funds may not be used for the academic pursuit of members of the organization or for items that are personal in nature.

For the full Student Fee Regulations: <https://cstudentgov.org/>

As a representative of a student organization, financial decisions must be made to further the purpose or mission of the student organization. Whether financially or otherwise, members of an organization may not use the organization, or resources to which it has access, for the purpose of personal or academic gain. Member acting on the organizations behalf are responsible for appropriately representing the activities and operations of the organization to University staff and others.

## FINANCIAL LAWS

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### **Raffles**

As mentioned above, Raffle activities are governed by Colorado State Gaming laws through the office of the Secretary of State. CSI maintains a Raffle License on CUSG's behalf and has a Certified Games Manager on staff as required by law. There are very strict requirements on how raffles must be reported, how they must be advertised, who can sell tickets, and how the Raffle drawing must be conducted. Organizations planning a raffle must meet with CSI in advance to discuss the requirements to hold a lawful raffle. We strongly recommend three months advance notice, but a minimum of six weeks.

### **Taxation**

Student organizations are required to remit sales tax for the sales of tangible goods, so it is important for students to consider this when set prices or fees for sales. CSI maintains a Boulder Sales Tax license and sales tax will be deducted from all applicable deposits into CSI accounts and will be remitted to the necessary bodies on behalf of the organization. If a tangible good will be received as a part of purchasing an admissions tickets (e.g. a meal, sticker, etc.) tax must be remitted on the lesser of value of the good received or the price of admission.

Depending on the situation, students may be responsible for reporting income received by the organization to the IRS. Because the student organization is considered a third-party to the University, CSI cannot provide the University's W-9 for tax exemption purposes. Generally, a student organization is not an entity recognized by the state and income may be attributed to individual members of the organizations. It is the responsibility of the organization to consider income tax implications when entering into sponsorship agreements and selling through third-party vendors.

## FINANCIAL BEST PRACTICES

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It is important to use fund for the purpose(s) designated when raising the money. While a student organization is generally not designated as a non-profit, meaning that money given to an organization is not considered a “donation”, misleading supporters can be damaging, not only for a single organization, but also potentially to all organizations on campus.

When practical, collect contact information for supporters. In addition to sending a thank you for their supports, it may be good to send updates about your organizations, or potentially contact them for future support.

Employ appropriate measures to protect the organization’s assets. This includes cash and checks, personal information of members and supporters, equipment, technology, or other property that belongs to the organization.

- Cash and checks: Money should be kept in a secure location during sales/ collection and in transport. CSI requires a student organization to request a cash box for sales on campus, but can also check them out for off campus use as well. Cash and checks should be deposited as soon as practicable. If funds must be stored overnight, be sure that it is in a location that is private and to which access is limited.
- Personal information: In addition to only using vetted third-party sites to collect and store data when necessary, information held locally by the organization should be stored securely. Do not collect more information than necessary. Do not keep/ store sensitive information, such as credit card numbers or social security numbers. Ensure that files containing personal information are stored securely (like on encrypted drives with password protection, with only those needing access given the password). Be sure to review the information regularly to remove unnecessary information.
- Equipment, technology, property: Be sure that property is stored in a secure location, allowing access to on members of the organization who should be using it. There are storage lockers available in the UMC. If this is not a feasible option, alternative options should be explored, to ensure that property belonging to the entire organization is not held by individuals who may not return it to the organization.

## | FUNDING OPPORTUNITIES |

### FUNDING SOURCES

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In addition to raising funds themselves, student organizations have access to apply to a variety of on-campus funding sources to support their activities. The funding sources generally fall into two groups based on the regulations that govern the use of the funds.

## Student fee funding sources

The CU Student Government (CUSG) supplies funding to several funding boards, with different missions or purposes. Some of the School and College Governments, which are also funding through Student fees, allow students to apply for funding. In addition to the individual governing documents of these boards, all of these boards are governed by the Student Fee Regulations. This document provides specific guidelines, to which all boards must comply when allocating funds, as to how funds from Student Fees can be used. An important piece to note is that student organizations cannot use student free funds towards fundraising.

## Non-Student Fee Funding Sources

Student Organization may also receive support from other on-campus sources not funded by student fees. Most commonly, there are academic departments to which the organization has ties, but may also be departments with funds specifically for student activities, such as RHA, ODECE, and the VCSA. While these funds are not governed by the CUSG SFRs, like all on-campus sources, these funds must be spent in accordance with campus policies.

## CATEGORIES OF FUNDING

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For the purposes of applying for funds, student activities fall into three main categories. Not all funding bodies fund all categories of funding, and some categories of funding are offered by a limited number of sources.

**Operational funding** supports the day-to-day activities of the organization, to further the organizations overall mission. Budget items generally funded in this category are posters, banners, or t-shirts for recruiting members and promoting the organization, food for member meetings, and equipment needed to conduct the organizational purpose (e.g. ribbons for a Ribbon Dancing club).

**Travel funding** is available to help organizations attend conferences, competitions, etc. that provide benefit to the organization. Travel funding is generally limited to airfare, lodging, ground transportation, and registration costs. Travel funds are for members who are enrolled students at the time travel takes place.

**Event funding** is provided for organizations to host programs which engage the broader community beyond the normal organizational meetings and gatherings, for others to experience the areas of passion and focus of student organizations. Events are not limited to a specific format, but often include speaking engagements, musical performances, hosting conferences or symposiums, and cultural shows. Event funding can cover a variety of expenses including venue expenses, equipment rental, speaker or performer fees, speaker accommodations, and marketing.

## FUNDING PROCESS

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Below is a brief overview of the steps involved in applying for funding. It is highly recommended that you meet with your CSI liaison before starting the application process for the first time to gain a better understanding of what to expect.

1. Complete the appropriate funding application in BuffConnect for the type of funds needed. Be sure to submit separate applications for each type of funding and each funding instance. A step-by-step guide for how to fill out the application can be found in the forms section of the BuffConnect portal.
2. Once submitted, the application will automatically be sent to the CSI Liaison designation for the organization's theme. The CSI Liaison will review the application, coordinating with the student who submitted the application to request any necessary revisions, clarification, or supporting documentation.
3. Then notification that the budget is ready to be heard will be sent in BuffConnect to the various funding boards. Each funding board will contract the organizations separately to schedule budget hearings. It is important to note that not all boards meet on the same cycle, some require more than one hearing and some do not meet weekly.
4. Meet with each Funding Board to have your budget heard and approved. Each board will approve the budget amounts and items sent to them separately. All Boards will need to hear and decide on a budget before it is available for spending. With a few exceptions, all budgets including Student Fee allocations will also need to be approved by the Legislative Council President to be complete.
5. After all approvals are complete, the member of the organization who submitted the budget should receive an email indication the budget is approved. At this time, a signer of the organization needs to arrange and attend a meeting with a member of CSI Finance staff to learn on what and how the money can be used along with pertinent rules, regulations, and deadline.
6. Spend approved funds (see below for general guidance on how funds can be accessed).
7. Complete post-spending reporting requirements. Each funding board has different requirements for when this report is due and what information is required. Consult with the individual funding board(s) for more specifics on this requirement.

Please note that once a budget is fully approved, an organization must spend the funds how allocated, unless otherwise approved. Some minor changes may be authorized within CSI Finance, but generally, an organization would need to contact the funding board(s) directly to make any modifications to "move funding" within line items on the budget or for items not previously requested.

## | SPENDING MONEY & FUNDING |

There are generally two types of accounts available to student organizations, which can be accessed by a signer, through the Treasury tab in the BuffConnect Portal: the Revenue Fund and Budgets.

### SPENDING MONEY FROM REVENUE ACCOUNT

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This is the account where monies collected by an organization from non-University sources are held.

Funds can be deposited into this account by bringing cash or check into the CSI Finance office and providing some brief information about the source of the funds. This can be accomplished even more quickly if a signer submits a deposit request in BuffConnect prior remitting the funds. Once deposited, these funds may be used for any legal purchases deemed to support the organization's mission. Please note that the University charges an administrative fee for all purchases processed through their system. At this time this is close to 7%. For ease of use, this is deducted from all deposits, so that BuffConnect reflects the "spendable balance" in the account.

Because the funds in this account are not from the University, it is not eligible for University contract pricing and CSI staff cannot use the University procurement card for Revenue Fund purchases. Regardless of the method chosen, all requests to use Revenue Fund accounts will need to be put in BuffConnect by a signer as a Withdrawal request, selecting one of the following options for the Payment Type:

- 1) Check request- The organization can have the University cut a check to a vendor. In order to accomplish this, the vendor will need to be set up in the CU Marketplace supplier database. If this has not previously been complete, CSI will need the name of the business and the name and email address of a contact at the business to complete the supplier profile. It generally takes a minimum of 5-10 business days to get a check request completed and mailed out. Note that a check request is the only way to pay an *individual for services* from a Revenue Fund.
- 2) Cash/ Check/ or Travel Reimbursement- Any member of an organization may make a purchase on the organization's behalf, but only a signer may submit a request to reimburse another member (or themselves) through BuffConnect. The type of reimbursement is dependent upon the type of item and the amount of the purchase. Any travel related purchases (e.g. plane tickets, Lyft, hotel, parking expenses) must be reimbursed by check *after the travel has occurred* regardless of amount. Any non-travel purchases over \$100 will also be reimbursed by checks. Checks can be mailed to a purchaser's home address, or to CSI for pick-up. Non-travel purchases under \$100 may be reimbursed in cash, but must still be requested by a signer in advance. As a reminder, payments to *individuals for services can never be reimbursed*, regardless of amount or type of service. In all cases, an itemized receipt showing what was purchased along with proof of payment must be supplied.

## SPENDING FROM BUDGET (FUNDING MONIES)

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In BuffConnect, Budget are the various funds provided to your organization from University sources. A single organization may have several Budgets available at one time, depending on what monies they have applied for or campus organizations have provided support.

It is strongly recommended that as new signers come on to an organization, they meet with CSI Finance to talk about what funds their organization might already have. However, as mentioned above, a signer *must* speak to a member of the CSI Finance team when a new Budget is approved.

In addition to the two methods available for the Revenue Fund (check request and reimbursement), Budget funds are from University sources and are thereby eligible for University purchasing card and contract rates. As with Revenue Fund, all purchases must be entered/ authorized by a signer as a Payment Request through BuffConnect.

**University Credit Card Purchases-** Signers may request to have CSI Finance staff make purchase on a university credit card. This method applies to most types of goods, but cannot be used for office supplies or furniture purchases. Purchases made with this method of payment must be under \$5000 and have to be tax exempt. Any purchase documents, including confirmations and receipts, must be returned to CSI staff as soon as they are available.

**Office Supplies/Furniture-** Because of state purchasing agreements, if an organization wishes to have CSI Finance make office supply or furniture purchases directly, they must be purchased through the CU Marketplace. Staples is the vendor for office supplies, and can generally deliver supplies within 1-2 business days. This includes small items with generally short life spans, such as pens, notepads, and printer papers. Computers, printers, and toner are not considered office supplies under the state contract. Furniture, including bookshelves, desks, chairs, and tables, are also on state contract with CCI (Colorado Correctional Industries).

**Flight purchases-**Flights can be booked through the University and charged directly to a University account through Christopherson Travel Agency. All flights (or flight changes) are assessed a \$20 booking fee. Not all flights and carriers are available and any charges related to changes made after the initial purchase are the responsibility of the party traveling.

### **Items requiring special arrangements:**

- *Purchases over \$10,000-* Purchases of goods over \$10,000 require a bid process, which can take several months or more. Payments for services over \$10,000 require a contract and some sort of proof that the rate charged is equal to that which others would pay. Contract review can take several weeks, so we recommend starting this process as early as possible.
- *Gift Cards-* Regardless of purchasing method, if University funds will be used for the purchase of Gift Cards, an Award or Recognition program must be set up in advance

of purchasing and distributing Gift Cards and some amount of information may need to be collected from the recipient.

- *Payments to individuals*- Mainly due to tax reporting requirements, payments to individuals requires advance paperwork, and it is the responsibility of the party being paid to know and consider the tax implications of the payment they are receiving. If the payee is an employee of the University, regardless of their home department, they must be paid through the University payroll system and the organization will be charged for that employee's benefits (at 1-38% the rate of pay depending on employee class). International payments to individuals requires a variety of paperwork depending on the person's Visa status. It is the responsibility of the Visa holder to know whether or not they are able to work/ receive pay. These payments will be assessed a 30% income tax, reduced from the payment amount prior to disbursement.

## OFF CAMPUS ACCOUNTS

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Your organization may wish to maintain any of its funds which are not received from University sources, collected on campus, or received in conjunction with a University funded event in an account outside of CSI. It is important to note that CSI staff cannot offer any financial advice or support for funds not deposited in an on-campus account. It is the organizations responsibility to obtain any necessary documentation to open an "off-site" bank account. Members of the organization are in charge of ensuring that the funds are used for intended organizational purposes. Additionally, your organization is solely responsible for the transition of account information from officer to officer as needed.

## | CAMPUS SPACE USAGE |

### UNMANNED AIRCRAFT SYSTEMS (UAS)

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The university unmanned aircraft system (UAS) or drone policy applies to all faculty, staff, students, and student organizations. Student organizations formed with the intent of using drones or with the interest in using drones on-campus should consult the policy as well as the Center for Student Involvement. The full policy can be found here:

<https://www.colorado.edu/policies/unmanned-aircraft-system-uas-operations>

### CUUF

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The use of campus space must be in compliance with the Campus Use of University Facilities (CUUF) policy and its accompanying procedural statement. Highlighted below are some essential policies related to common activities of student organizations. It is recommended that student organizations review all CUUF policies before using on-campus space.

The full CUUF policy can be found at: <https://www.colorado.edu/policies/campus-use-university-facilities>.

## **Chalking**

Chalking may only be used to promote RSO/RSGO activities or events. All chalked messages must indicate the organization created the message if it is not reasonably apparent in the message. Chalking may only occur on concrete or exterior sidewalks and is prohibited on building exteriors, under overhangs, on benches or other surfaces intended for sitting, and within 10 feet of any building entrance. Only water-soluble stick-chalk may be used. The University may erase without notice any chalked messages that do not comply with policies and regulations. Student organizations may be charged for the removal of non-compliant chalked messages.

## **Golf Cart Usage**

Student organizations, are in general prohibited to use golf carts. Golf carts may only be used by student organizations when they are part of an appropriately scheduled University event. All golf carts must be registered with Parking and Transportation Services (PTS) and display a temporary identification sign that will be issued by PTS. All drivers of golf carts must successfully complete the University Defensive Driving training prior to use. While using a golf cart, all operators must yield to pedestrians, bicycles, and skateboards. Additionally, all golf carts must refrain from operation on campus walkways during class changes. Any accident, damage, or personal injury involving a golf cart – regardless of whether or not the vehicle was in motion at the time of the incident – must be reported to the University of Colorado Police Department (CUPD) and Risk Management.

## **Amplified Sound**

Amplified sound for all campus events is limited in several ways. Amplified sound is not permitted within the campus academic zone, which includes Norlin Quad, Duane Lawn, and other spaces near academic buildings between 8:00am – 5:00pm on weekdays. Amplified sound is allowed daily during the week within the Dalton Trumbo Fountain Area between 12pm – 1pm. Events outside of the restricted sound zone and on the weekends may have amplified sound between 8:00am – 11:00pm. Any event with amplified sound must not exceed 80 decibels (dB) when measured at the perimeter of the venue. Event organizers are responsible for complying with the amplified sound policy and ensuring appropriate methods are in place to track and monitor sound for compliance.

## **Canvassing and Free Speech**

Students, regardless of organization affiliations or lack thereof, may engage in canvassing and other non-commercial expressive activities on sidewalks and in other outdoor areas not otherwise scheduled for events. Students engaged in canvassing activities may not use tables, displays, temporary structures, or other structures, unless they have been approved through the appropriate event scheduling process.

In recognition of its namesake, free speech and civil rights advocate Dalton Trumbo, the Dalton Trumbo Fountain Court area on the north side of the UMC provides a space for the free

expression of ideas on campus by allowing for public non-commercial discussion and public expression without scheduling between the hours of 9:00am and 5:00pm.

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## | EVENT PLANNING |

### EVENT MANAGEMENT FORMS (EMF)

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Once you have reserved a space on campus for an event, you may be asked to complete an Event Management Form (EMF). This form ensures a variety of departments on-campus are aware of your upcoming event and can provide you important information.

### SAFE MEETINGS

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When hosting an event on-campus, student organizations may be asked to attend an in-person SAFE meeting. This meeting is to ensure all aspects of risk management and safety for your event have been addressed.

### SECURITY

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Venue Security: Contact your venue to see what security is required for you to hold the event in their venue.

### POLICE /FIRE

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The CU and Boulder Police Departments want to help ensure your event is safe. To learn more about working with the police at an event, go here: <http://www.colorado.edu/police/services-faqs/event-security>

#### **Fire**

A fire can occur anywhere, causing a catastrophic event and irreparable loss of human lives. Because of the potential danger, student organization members need to understand and be knowledgeable of some basic precautions that need to be taken to reduce the risk of fire.

Unfortunately, fire can occur anywhere, including venues that student organizations use to host events, such as off-campus clubs, apartments, or houses. When a place for a social function is selected, there are some things to keep in mind:

- Does the location have sprinklers?
- What is the occupancy limit? Do not exceed this limit

- Are your decorations flammable? If so, get them fire-proofed or do not use them
- Are the smoke detectors blocked or covered? Ensure that smoke detectors are in good working order and are not covered in any way
- Do you know where to exit in the event of a fire? Remember the best way out may not be the way you entered
- Consider posting “No Smoking” signs, especially if using a tent

## CRISIS RESPONSE

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While student organizations are advised to plan their activities and events in such a way as to avert crisis, it is important to proactively plan how to respond in the event one should occur. Intentional development of a crisis response plan prior to an event or activity will empower the organization to effectively respond. Educating members prior to a crisis is crucial. All organization members must know who is in charge and be prepared to follow the plan.

The following information is intended to assist students in the development of a crisis response plan fits the organization’s needs.

### General Crisis Response Plan

- Develop a crisis response strategy for your organization prior to your event or program.
- Create a step-by-step process for what to do in case of a crisis.
- Designate organizational officers and crisis team who can take charge of a crisis situation.
- Review your crisis response plan on a regular basis and update plan as needed.
- If medical attention is needed, attend to those needs before doing anything else. Contact 911 for on or off-campus emergencies.
- Contact the appropriate authorities:
  - Notify Police Department.
  - Notify your advisor if she or he was not part of the activity.
  - Notify all organization members in a meeting.
  - Other offices that should be included?

## ALCOHOL

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Alcohol service on campus should comply with all local, state, and federal laws as well as the policies around alcohol service on campus, which can be found here:

<http://www.colorado.edu/policies/alcohol-service-campus>

When considering if alcohol will be served at your event, ask yourself the following questions:

- What is the purpose of the event? Does it relate to my student organization?
- Who will attend the event, and why?
- What resources are being used for the event? Is our organization providing any funding, marketing, etc. for the event?

- How is the event being publicized or communicated, both to the general public/campus community and to my organizations members?
- Would a reasonable person associate this event with my organization? Would the media associate the event with my organization?

## CONTRACTS

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An agreement between speakers, performers, facility rentals, and catering services may ask you to put your agreement in writing as a contract. Legal language can be difficult to interpret so it is important to review the contract before you agree to them by your signature. Once signed, contracts are legally binding for all parties to the contract.

Regardless of the format, most contracts are going to have standard components that are meant to protect each of the parties involved. Here's what you'll usually find:

- A description of the parties in the contract, the date of the contract and of the event and a general overview of the goods or service being contracted.
- A statement of the contract duration, clarifying how long the document will be valid.
- A specific description of each party's obligations and responsibilities as a result of the contract.
- Any relevant operative provisions, such as applicable warranties or exclusions. Often, this section will appear as a disclaimer or other limiting language that may give one party advantage over the other.
- A list of enforcement provisions to cover any “what if” situations, such as a party failing to fulfill its obligations, dispute resolution plans, unforeseen circumstances affecting the terms of the contract, etc.
- A closing section that indicates the agreement of both parties to the terms of the contract.
- You may see an indemnification clause that says one party will be compensated for any damage caused by another party. There may also be a hold harmless clause that states one party cannot sue the other party or hold it liable for losses.

NOTE: It is not recommended that student organizations agree to indemnify or hold harmless another party. To do so would not be in your best interest. HOWEVER: The student organization is responsible for its own actions with respect to contracting and for seeking its own legal advice; nothing in this handbook should be construed as legal advice.

TIP: The earlier you obtain your contract for review, negotiations and revisions the better!

One of the most important things to remember is that student organizations are NOT employees or designated representatives of the University, meaning, you CANNOT commit the University to a contractual agreement. Some third parties have a hard time understanding this, so we ask that you make it clear for them by including this statement somewhere in your contract: "(Name of Organization) is a recognized student organization at (name of University)

and does not represent the University or contractually obligate the University to any agreement.”

If you are getting student fee funding to pay for your contract, there is a different process. Please see your CSI Liaison before completing the contract.

## INSURANCE

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A special event is usually defined as an event of short duration or an event that is not permanently ongoing. Such an event may last only one day, such as a concert, auto show or a class reunion and picnic, or an event may last a month or more such as a county fair or a Christmas tree sales lot. The defining factor is that a special event is not set in a permanent location and does not continue for an indefinite period of time such as a continuing operation or long term business. Event Insurance is specifically designed to provide event liability insurance protection for all types of special events.

Your organization, the special event holder, may be required to provide proof of liability insurance to the facility/venue where you have decided to hold your special event. In addition to providing proof (in the form of a piece of paper known as a Certificate of Insurance) to the facility/venue that you have secured a valid policy, you may also be required to add the facility/venue to this required liability policy as an insured. This is known as adding the facility/venue as an Additional Insured to this liability policy which the facility/venue requires you to purchase before you will be allowed to hold your special event.

Your organization may contact a venue insurance carrier or a local broker for a quote for a specific event. You can also reach out to CU Risk Management and they can help provide you with insurance carrier contacts.

## FOOD SAFETY

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Follow the campus protocol regarding providing food for activities/events.

Allergen warnings should be posted by all foods with potential allergens. Allergens include:

- Milk
- Eggs
- Peanuts
- Tree nuts (like walnuts or pecans)
- Fish/Seafood
- Shellfish
- Wheat (this includes gluten)
- Soy

# | EVENT PLANNING CHECKLIST |

## Come up with an idea

- What do you hope to accomplish?
- What population will your event or activity attract? Students, staff, faculty, community members?
- Does the event reflect your organization's mission? If not, what are some downfalls or benefits to this?
- Would this event benefit only CU Boulder students? Is the community able and encouraged to attend?
- What type of event is this? Community building, social, fundraising, educational?
- Will you be asking community organizations to donate items or sponsor the event?
- What is the size of this event? Would you consider it a large-scale event?
- Does this event have any safety concerns? Do you need to contact Risk Management before proceeding?
- Have you set-up a time with your CSI Liaison to talk about your event?
- Are there members of your organization that are ready and willing to help with this process?

## Choose a date and reserve a room/space

- What other events are going on this week? Is there a conflict?
- Does this date give you enough time to plan and/or fundraise?
- Can you get a room on your desired date? Many of the large scale event spaces such as the Glenn Miller Ballroom, UMC 235, Macky Auditorium, and the Campus Recreation Center are often reserved months in advance. Room reservations can be made with the Events Planning & Catering office
- For outdoor events, be sure to also reserve an indoor space in case of inclement weather
- Consider your Audio/Visual needs and book a space that will meet these needs

## Budgeting

- Have you looked at what types of funding you can receive for your event?
- Will you be applying for event funding from student fee funding sources and/or other campus funding sources?
- If yes, have you set-up a time to talk to your Center for Student Involvement (CSI) liaison? It is best to meet with your liaison at least 30 days prior to your event date, if not more depending on funding board deadlines.
- Have you filled out your event funding request form?
- If costs are too high, could you collaborate with another student organization?
- If you have been allocated money from campus funding sources, have you met with a CSI finance staff member for your spending meeting?
- As you continue planning your event, make sure you secure all contracts with CSI, keep all receipts, etc.

## Event Details

### Having food?

- Have you contacted the Events Planning & Catering office to talk about your specific needs for your event? The location of your event will determine what restrictions your event will have regarding the food vendor. Most of the buildings on campus require you to go through the Events Planning & Catering office for your events.

#### Bringing an entertainer/speaker/musician to campus?

- Are they being paid and/or have a contract that needs to be reviewed and signed? If so, please set-up a time with the CSI finance team to talk about the contracting process.

#### Showing a movie?

- Have you purchased the necessary public viewing rights to be able to show the movie?

#### Having a raffle or giving away prizes at the event?

- There are many IRS, State of Colorado, and campus policies that must be followed. Come talk with CSI finance staff about what's possible.

#### Other details

- What kind of decorations will you have?
- Do you need to print programs, order parking permits, purchase name tags, or put out directional signs?
- Will there be money exchanged at your event? If so, you will need to check out a cash box from CSI.

#### Advertising your Event

- When are you going to start advertising?
- Have you visited the CSI Resource Center to how it can support your marketing ideas?
- How much money are you willing to allocate for advertising?
- What methods are you going to use to advertise? Some suggestions are:
  - Tabling in the UMC and at other locations around campus.
  - Digital Signage in the Residence Halls, C4C, and the UMC.
  - Facebook and other social media sites
  - Hang posters around campus
  - Word of mouth – ask your professors to make an announcement in class!
  - Campus Events Calendar
  - CU Boulder Today
  - Yard Signs
- If it is a large scale event or have the possibility of media attention, talk with your CSI liaison to put you in contact with CU Strategic Relations

#### Day of Event Activities

- Make sure the event is properly staffed and everyone knows their job, where they're supposed to be, and when.
- Create a run of day document to distribute to organization members and volunteers helping with event
- Arrive early to set up and meet your audience.

#### After the Event

- Clean up appropriately, return any rented/borrowed items.
- Evaluate your event and decide what needs to be improved in the future.

- Reconcile all financial records. Make sure you submit all reimbursements and receipts to the CSI finance staff by the deadline given to your student organization in the funding meeting.
- Submit after event reports for funding boards and departments that supported your event as required.
- Send thank you cards.

Helpful Resources for Event Planning

Center for Student Involvement

Location: UMC 330

Email: [involvement@colorado.edu](mailto:involvement@colorado.edu)

Phone: 303-492-6366

Office of Risk Management

Contact: Carolyn Peet

Email: [carolyn.peet@cu.edu](mailto:carolyn.peet@cu.edu)

Phone: 303-735-5900

Center for Student Involvement – Finance

Location: UMC 330

Email: [CSIFinance@colorado.edu](mailto:CSIFinance@colorado.edu)

Phone: 303-492-6366

Parking & Transportation

Contact: Sissy Hendricks

Email: [pts-events@colorado.edu](mailto:pts-events@colorado.edu)

Phone: 303-492-1323

CU Strategic Relations

Contact: Greg Swenson

Email: [Greg.Swenson@colorado.edu](mailto:Greg.Swenson@colorado.edu)

Phone: 303-492-3113

CU Police Department & Department of Public Safety

Email: [DPSEvents@colorado.edu](mailto:DPSEvents@colorado.edu)

Phone: 303-492-5954

Events Planning & Catering

Email: [schedule@colorado.edu](mailto:schedule@colorado.edu)

Phone: 303-492-8833

Program Council

Email: [production@programcouncil.com](mailto:production@programcouncil.com)

Phone: (303) 492-7704

Campus Dining Services

Phone: 303-492-6871

# | RISK MANAGEMENT |

## WHAT IS RISK?

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As a student organization leader, you hold the responsibility to be informed and educated on how to protect your organization from unnecessary potential and perceived risks.

Risk is the uncertainty arising out of a given set of circumstances. The management of risk is a process of managing the uncertainty and taking steps to mitigate the “what ifs.”

### **Effective Risk Management**

- Ensure the safety of students and other participants in organization events by creating awareness for potential dangers involved with activities
- Create plans to address accidents and issues that may arise
- Keep the organization’s reputation positive
- Reduce financial loss to the organization and governing officers
- Ensure compliance with campus policies and guidelines

Is it worth the risk?

Consider the risks you and your organization are taking. It is important to ask if there is enough return on the risk or are the risks far greater than the benefits of the activity?

## TYPES OF RISK

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### **Physical**

Harm or injuries to the body caused by physical activity, weather, equipment, food-related illnesses, alcohol consumption.

### **Reputation**

Harm to the reputation of individuals, organizations, administrators, departments and institutions. This risk can come from poor conduct or behavior at events or from events with offensive subject matter.

### **Emotional**

Mental health risks to those attending/participating in an event or program. These risks include hazing, lack of accessibility, discrimination, controversy or disruption of the campus, and adverse reactions.

### **Financial**

Risks to budget of an event and the overall budget of the organization. Possible risks are loss of funding, poor budgeting, lack of fundraising and the opportunity for a lawsuit with financial implications.

## **Facilities**

Risks involving safety of the facilities includes the maintenance or set-up of the facilities used by participants. Possible risks include a lack of proper set-up or clean-up for the event, safety and security issues at your location, and a lack of familiarity with the facilities and location or the disruption of University facilities.

## **LEVELS OF RISK**

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### **Low**

- Risk likely to be non-catastrophic in nature
- Risk typically universally accepted by all participants
- Low impact or likelihood of occurrence

### **Moderate**

- Risk is not excessive or extreme and likely to be infrequent
- Risk management office or team may get involved
- Waivers may be required

### **High**

- Involves the possibility of life threatening or debilitating personal injuries, property damage and/or negative financial implications
- Consequences may be severe
- Waivers will be required

## **RISK ASSESSMENT**

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The purpose of the Risk Management section is to assist organizational leadership to determine whether or not to move forward with a particular program or activity. Risk analysis implies a structured process during which various risks are identified, measured and planned for, which allows for the organization to manage and mitigate the risks. If you have questions, please do not hesitate to contact your assigned liaison in CSI. The following are steps you can take to assess your risk:

- What is the activity/event?
- Does the activity/event align with the organization/University mission, vision and values?
- Identify the risks
- Classify the risks
- Manage the risks - prioritizing the risks according to the identification and analysis and plan for management of them
- Is it worth the risk? Communicate risks, keep information updated.

## LIABILITY/WAIVERS

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Student organizations, student leaders, and advisors are not exempt from the courtroom. As an organization it is understood that you will do everything in your power to prevent harm or injury from occurring to both your members and participants, and in accordance with the student organization agreement you are responsible for the your own conduct, and that of the student organization. If you do not take the time to train on safety, provide proper supervision for activities, maintain equipment that is being used, or warn others of danger, you could be found responsible for negligence, so please remember to take your duties seriously. When it comes to your events, you can never be too careful.

There are many ways you can protect your organization from liability including the use of waiver forms. Waivers are just one part of a bigger risk management plan, and they do not do any good unless you educate participants on what they are signing and why they are signing it. A waiver is meant to help others understand the risks associated with an activity, but you have a responsibility to make sure that these risks are communicated clearly and specifically.

## HAZING

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Hazing is defined as any action or situation that recklessly or intentionally endangers the health, safety, or welfare of an individual for the purpose of initiation, participation, admission into, or affiliation with any organization at the University. Hazing includes, but is not limited to, any abuse of a mental or physical nature, forced consumption of any food, liquor, drugs, or substances, or any forced physical activity that could adversely affect the health or safety of the individual. Hazing also includes any activity that would subject the individual to embarrassment or humiliation, the willingness of the participant in such activity notwithstanding.

To report hazing in your organization contact the Director of CSI or submit a report at [https://cm.maxient.com/reportingform.php?UnivofColorado&layout\\_id=3](https://cm.maxient.com/reportingform.php?UnivofColorado&layout_id=3)

## POLICIES

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As a student organization leader, you should be aware of campus policies and guidelines including venue specific guidelines.

All campus policies: <http://www.colorado.edu/policies>

The Campus Use of University Facilities: <http://www.colorado.edu/policies/campus-use-university-facilities>

Risk Management: <http://www.colorado.edu/policies/risk-management>

# | RESOURCE CENTER |

## OVERVIEW

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Recognized Student Organizations with the Center for Student Involvement have access to resources located within the Resource Center. The Resource Center space is not a reservable space, but may be used by student organizations on a first come, first served basis. The Resource Center is not intended to be a general meeting area for CSI staff, students, or student organizations. The space can be used for outside programming put on by or directly impacting student organizations, with advance notice and in coordination with Resource Center staff. Any member on the roster of a recognized and active student organization may use Resource Room services. Purchases must be submitted by student organization account signers prior to receiving materials.

## AVAILABLE SUPPLIES & RESOURCES

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As item availability permits, organizations will have free use of butcher paper, markers, rubber bands, paper clips, Cricut machine, sidewalk chalk, office supplies, arts & craft supplies, Adobe design software, and using our copy machine to scan & email files.

Items available for purchase include printing (see below), reams of paper, lamination for items less than 11" x 17", and nametags (depending on quantity needed). Other items may be available upon request. Note that some items have limited availability and may take 24 to 48 hours for pickup.

For large-scale programming please check with our Resource Center staff to ensure we can provide supplies to meet your needs.

The Resource Center has various books and tip sheets on leadership, teambuilding, etc. Books may be checked out for TWO WEEKS at a time and activity kits may be checked out for ONE DAY; due back by 12:00 noon the following business day. Organizations are responsible for any damaged equipment, kits, and supplies.

## PRINT REQUESTS

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The Resource Center can do both small scale and large-scale printing (up to 24" x 72") in both black & white and color. A variety of paper sizes and colors are available, and others can be made available upon request.

Before requesting printing please make sure:

- 1) You are authorized to make purchases for your organization (are a signer).
- 2) You have funding to spend on printing (main account or budget from on-campus source).

If you are unsure of either of these, please stop by the Center for Student Involvement to talk with our finance staff.

Printing requests can be submitted through the treasury section of BuffConnect and are only accessible to organization signers. To submit a print request you will need to identify the funds you wish to spend from:

- 1) **Revenue Fund (main account)** - Navigate to Revenue Fund section and CREATE WITHDRAWAL, selecting CSI Resource Center as the payment type.
- 2) **Budgets** - Select the appropriate budget, click into the official line-item section of that budget, and then REQUEST PAYMENT, selecting CSI Resource Center as the payment type.

If you have specialized printing requests or other questions, please stop by the Resource Center to talk with staff.

## PROGRAMMING

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Whether utilizing our space to put on your programming or attending some of our own – we’ve got you covered!

### Be Our Guest

Utilize our space for your own meeting/outreach event/community service project - we’ll even help you promote the event! The resource center features movable tables and ample counter space, ideal for meet & greets and assembly-line styles of community service events. To schedule an event, please email us.

### Transition Workshops

Our staff is able to help guide you through what things you need to talk about when changing organization leadership. Additionally, we can give your new leadership a walking tour of the CSI office to better equip your organization for success. To schedule a transition workshop, please email us.

### Pinterest & Popcorn

This ongoing workshop series features craft projects, hands-on workshops, snacks, and a chance for you to socialize with other student organization members.

# | OFFICE/STORAGE/SPACE |

## OFFICE (UMC)

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The UMC Board annually allocates office space to a select number of student organizations. To learn more about that process, go to [www.colorado.edu/umc/board](http://www.colorado.edu/umc/board).

## STORAGE (CSI)

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### **2nd Floor Storage Lockers**

A small number of locking cabinets located in the Student Engagement and Collaboration Area (SECA) on the second floor of the UMC are available to student organizations for short term use. Reservations for these cabinets must be made through the UMC Events Planning and Catering (EP&C) office. The Resource Center Coordinator or designee will manage the lockers, including relaying necessary information to EP&C about student organizations wishing to make reservations, setting and distributing lock combinations at the start of reservations, and working with UMC staff to remove items from lockers not removed by owners at the end of reservations.

### **3rd Floor Storage Lockers**

Storage lockers located in room 362 of the UMC, measuring 17" x 18" x 31" (W/D/H), are designated for student organization for long term storage. They are allocated or renewed through an application process administered by the CSI and UMC Boards. The Resource Center Coordinator, or designee, will participate with the CSI Board sub-committee and assist with collecting and reviewing applications as well as notifying organizations of their application or renewal status, providing student organizations with access to the lockers, and managing the use and maintenance of these lockers.

Storage lockers allocated to student organizations are property of the Center for Student Involvement and should not be modified, decorated or altered. Storage lockers are meant for storage of official student organization business and should not be used as group members' personal storage location or to store materials which are illegal or against campus or building policy. CSI retains the right to access storage lockers at any time to ensure the safety and security of the building. We will never access lockers without prior notification, except in emergency situations or with probable cause of a safety/security violation or other illegal usage. Student organizations are to immediately report to Resource Center Coordinator any damage to or theft from storage lockers. A police report can be filed and the UMC Building Procter notified. Building insurance may be available to replace stolen items, depending on the value.

## EP&C

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If your organization would like to reserve space for a meeting or an event, contact the UMC Events Planning and Catering Office in UMC 140 or call 303-492-8833.

# | VIRTUAL SERVICES & SOCIAL MEDIA |

## EMAIL

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[Involvement@colorado.edu](mailto:Involvement@colorado.edu)

## WEBSITE

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[www.colorado.edu/involvement](http://www.colorado.edu/involvement)

## CSI NEWSLETTER

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As the primary method for communicating with student organizations, CSI will send out a biweekly newsletter to all organizations in good standing via email. The newsletter will be sent to the following organization entities: the communicator, all signers, and the organizational email account. This newsletter will include information regarding organization upkeep, funding deadlines, upcoming trainings, and other related items.

## SOCIAL MEDIA

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<https://www.facebook.com/CUBoulderStudentInvolvement/>