



SOA UPDATE

CATS Meeting 4/25/2019

Student Organizations Policy (STU-01)

Effective 7/1/2016

Self-Governed Student Org (SGSO)

- The SGSO is an **independent entity** or **independent association of individual students**, operates independently and is not an agent, servant, or employee of IU, and neither has the authority to act for the other or commit the other to any activity, transaction, or agreement.

University Student Org (USO)

- University Student Organizations **are treated as operating units of Indiana University**. As such, USOs will be entitled to administrative services as a university unit and additional use of IU branding. However, USOs will have to comply with all university policies.

SOA Closing Status

- As of 4/23/2019 we have 361 active SOA accounts
 - Down from 711 on 7/1/2018
- So far 160+ orgs are classified as USOs
 - Still waiting on classification for orgs such as club sports
 - FMS created an account type code of "SO" for USO accounts in KFS
- SOA will no longer process payment requests or reimbursements after 6/30/2019
 - Starting 7/1/2019, SOA will only process account closings



Departmental Support to SGSOs

- FMS and Legal have both confirmed that departmental support to SGSOs is allowable.
 - SGSOs contribute for directly and indirectly to the mission of IU
- A standard operating procedure (SOP) will be developed and published
 - Target date 7/1/2019



RPAQs For USOs

- RCs can complete one RPAQ that includes all USOs under the RC and lists the potential types of RPAs in which those USOs will engage. The RPA should include a budget for each USO reported in the RPA.
 - The RPAQ will need to be updated when new USOs are added or when a USO seeks to add a new revenue producing activity.
 - (example: assume a USO is approved to collect revenue for a monthly brown bag lunch but now wants to add an annual fun run in which entrance fees are collected. The RPA on file will need modified to add the 'fun run' activity' and to seek approval for the event.)
 - *If the total revenue of USOs in the RC is below \$1,000, an **RPAQ is not needed.***
- RPAQs **are not required** for fees covered under the Student and Other University Fees Approval policy (FIN-BUD-80) that are only collected through the bursar office.



RPAQs For USOs

- USO RPAs are subject to all IU policies and procedure for revenue handling.
 - Students handling revenue are required to complete the online Revenue Processing Tutorial every two years and the Security Awareness Training (SAE) annually if handling credit/debit cards.



RPAQs For USOs

- All current IU payment methods are available to USO RPAs
 - This includes PayPal and Commerce Manager online payment options
 - IU does not currently have the ability to use Square or other mobile payment methods. Treasury Operations is willing to work with a department to develop this through PayPal. If approved by Treasury Operations, the department would have to purchase a dedicated mobile device, such as an Ipad. Treasury Operations would need to work with the University Information Security Office to create the device specifications and security protocols. This may take some time to get started, but it is a possibility.
 - IU currently does not have an enterprise shopping cart/store front solution. Commerce Manager has some limited functionality that can act in similar capacity. PayPal can be used with a shopping cart/store front if approved and established through Treasury Operations. Only .edu sites will be approved for the acceptance of revenue.



RPAQs For USOs

For questions regarding USO RPAQs,
please contact Melissa Hartley at
melhartl@iu.edu.



USOs and Fundraising for Donations to Charities

- A question was raised about If USOs will have the ability to do fund raisers for charities and how that would work.
 - This question was posed to FMS. A final decision has not been made.



SGSOS AND FOUNDATION ACCOUNTS

(Still under discussion, but as of 4/23/19)

- Being that SGSOs are not IU and do not fall under IU's non-profit status, they are not eligible to have funds held at the IUF. SGSO's are not qualified organizations to receive charitable contributions.
 - IUF is in the process of reviewing existing gift accounts to ensure funds are not being held on behalf of a SGSO.
 - IUF would like the official list of USOs to aid in this endeavor as the list is updated
 - Technically in the past student orgs should not have been able to hold funds at the IUF.
- USOs are IU and can have funds at the IUF
 - Charitable gifts to the USOs should run through the IUF
 - Fundraising through sales and dues should run through IU
- Financial support to SGSOs is not allowable using IUF funds.
 - If a department is co-sponsoring an event with an SGSO, that department could use IUF funds to fund their portion of the expenses for that activity/event.



NOTE: Regardless of funding source, IU departments should only issue direct payments of expenses (i.e. travel expenses, procurement of goods, etc.) that are used for direct university purpose.



DORMANT SOA ACCOUNTS

- What happens to the funds in SOA if no org claims them?
 - SOA will wait until the end FY2020 to close the bank accounts and deposit remaining funds into an IU account. Campus leadership will determine how those funds will be used.



SGSOS AND MOTOR POOL

- Can SGSOs use motor pool vehicles?
 - Yes

