



SOFO INFO:  
PEOPLE, PLACES, & RESOURCES



Student Organization Finance Office

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# What is SOFO?



- The Student Organization Finance Office (SOFO) provides financial training and banking services to student organizations recognized by Northwestern University.
- Location:
  - Norris University Center, First Floor
- Hours:
  - Monday – Friday, 9am-4pm
  - Summer and Academic Breaks:
    - Monday – Friday, 9am-12:30pm
- Contact:
  - 847.491.2328
  - [sofo@northwestern.edu](mailto:sofo@northwestern.edu)
- Website:
  - [sofo.northwestern.edu](http://sofo.northwestern.edu)

# What does SOFO do?

- Our services include:
  - Establishing an account to maintain an organization's funds in trust
  - Facilitating transactions requested by an organization's administrative group to and from the account
  - Providing a transactional interface to work with NU Financials, the University's accounting system
  - Reporting account activity



# Who works at SOFO?

- Student Staff
  - ▣ Financial Assistants
  - ▣ Student Supervisors
- Professional Staff
  - ▣ SOFO Supervisor
  - ▣ SOFO Manager



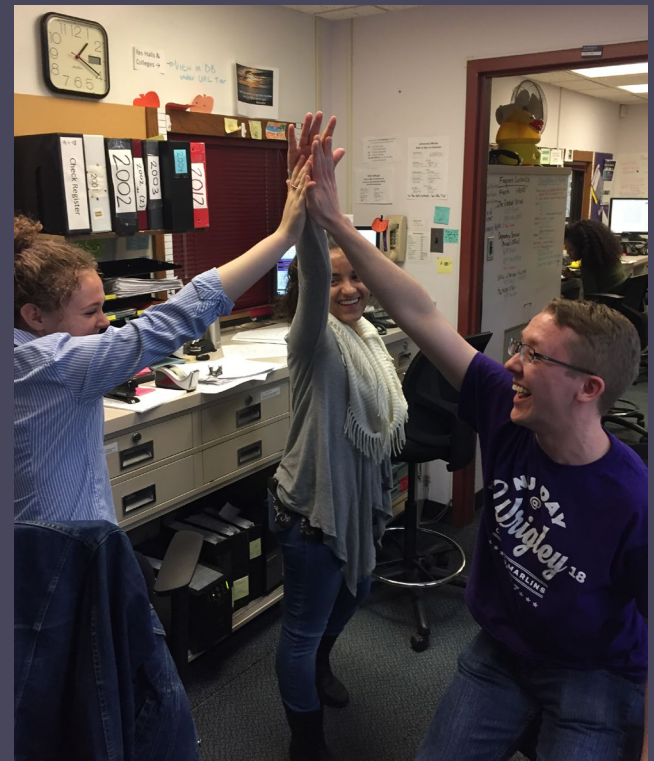
# SOFO Student Staff

## □ Financial Assistants

- Provide customer service to organization officers at the SOFO window
- Review and accept financial transactions
- Offer guidance for successful transactions and recordkeeping
- With the help of supervisors, help see transactions to completion by making checks

## □ Student Supervisors

- Train organization officers to interact with SOFO
- Provide additional oversight for transactions
- Offer guidance for transactions that require advanced knowledge and experience
- Maintain records of student organizations and their officers



# SOFO Professional Staff

- SOFO Manager
  - ▣ Additional/Special Payments
  - ▣ iBuyNU
  - ▣ NU Financials
  - ▣ Preferred Vendor Transactions
  - ▣ Procurement Card payments
  - ▣ Purchase Orders
  - ▣ Stage 3 Service Escalation
  - ▣ Travel and Accommodations



**SOFO Manager**

Ana L. Reotutar

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# SOFO Professional Staff

- SOFO Supervisor
  - Oversees daily SOFO operations
  - Processes non-check-based transactions
  - Verifies Cashier's Office Submissions
  - Stage 2 Service Escalation



**SOFO Supervisor**

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# Who works directly with SOFO?

## Officers

- Each organization must have two officers signed in to their SOFO account
  - Treasurer
  - President
- These officers are referred to by SOFO as the **president** and **treasurer**, but these titles do not necessarily need to correspond to the officers' exact title within their group
- Officers must be SOFO authorized in order to begin transacting with SOFO. For more information on the authorization process, visit the SOFO website:
  - <http://www.northwestern.edu/norris/services/sofo/officer-training/index.html>

# SOFO Officers

## Officer Responsibility Overview

### □ Treasurer

- Primary SOFO Contact with group financial transactions
- Initiate/Authorize transactions
- First signature on transactions
- Submits transactions to SOFO in person
- Makes sure that all financial transactions are followed through
- Maintain group's ledger book and voucher book
- Reconcile group's account every quarter
- Educate group members on SOFO transaction requirements and policies

### □ President

- Authorize transactions
- First reviewer and signature approval of transactions
- Secondary SOFO Contact with group financial transactions in treasurer absence
  - In the absence of the treasurer, the President acts as backup



# SOFO Authorization Process

- To become authorized, please follow these procedures in order:
  1. View the Presentations on the SOFO website:
    - <http://www.northwestern.edu/norris/services/sofo/officer-training/index.html>
  2. Print and fill out the [SOFO Quiz](#). All questions can be answered by reviewing the presentations or our [SOFO Policies and Procedures handbook](#).
  3. Select three training dates, in order of preference, and write the dates on your completed quiz. The training dates are posted on the SOFO website. **Note:** You only need to attend one session.
  4. Bring your quiz to SOFO and have it graded by an attendant.
  5. You will be given your live presentation date after your quiz is graded. Training dates are filled on a first come, first serve basis.  
\*The training is interactive and will require officers to continue to review SOFO policies and procedures before the training.

# Who works directly with SOFO?

## □ Advisors

- Each organization must have an advisor signed in to their SOFO account
- Advisors must sign off on all transactions submitted by the group to confirm that the group's activity is consistent with its mission and meeting university standards
- For Information on obtaining an advisor, contact your advocate authority or the Office of Student Organizations and Activities:
  - <https://www.northwestern.edu/studentorgs/about/about-soa/index.html>

# What are some SOFO resources?

## □ Online

### ■ SOFO Website:

- <http://www.northwestern.edu/norris/services/sofo/index.html>

### ■ Training Presentations/Handbook:

- <http://www.northwestern.edu/norris/services/sofo/officer-training/index.html>

### ■ Online Resources:

- <http://www.northwestern.edu/norris/services/sofo/officer-resources/index.html>

## Officer Resources

- + SOFO OFFICER BASICS
- + TRANSACTION CHECKLIST
- + REIMBURSEMENTS
- + PETTY CASH
- + PAYMENTS
- + CONTRACT INFORMATION
- + TRANSFER
- + CHECK ADVANCE
- + STUDENT ORGANIZATION DEBIT CARDS
- + HOW TO FIND STUDENT ORGANIZATION FUNDING

# What are some SOFO resources?

- Contact a SOFO Representative
  - By email: [sofo@northwestern.edu](mailto:sofo@northwestern.edu)
  - By phone: 847.491.2328
  - In person at the SOFO office
  - SOFO mostly interacts with signed-in officers of registered student organizations, but we are available to talk to anyone with questions about our office and procedures



# SOFO Campus Partners

Offices across campus that interact with student organizations and SOFO

# Cashier's Office

- Location:
  - Norris University Center, First Floor
  - Adjacent to SOFO
- Hours:
  - Monday – Friday, 9am-4pm
  - Summer and Academic Breaks:
    - Monday – Friday, 9am-12:30pm
- Contact:
  - 847.491.8655
  - [norris-cashier@northwestern.edu](mailto:norris-cashier@northwestern.edu)
- Website:
  - <http://www.northwestern.edu/norris/services/cashiers-office/index.html>
- The Cashier's Office operates differently from SOFO in that it is open to all Norris patrons, whereas only student group officers may interact with SOFO.





# Cashier's Office Professional Staff

- Cash Services Manager
  - Distributes petty cash
  - Enters account deposits
  - Prepares starting funds
  - Manages debit cards
  - Public Notary (by appointment)
  - Manages the Norris Box Office
    - Sets up events
    - Sells tickets



**Cash Services Manager**

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# Cashier's Office

- For student organizations with SOFO accounts, the Cashier's Office offers the following services:
  - Deposit acceptance and verification
  - Fund preparation and reconciliation for student-sponsored events
  - Cash-handling information and training
  - Coin counting
  - Debit cards
  - Petty Cash pay-out
- The Cashier's Office also offers the following services to all Norris patrons:
  - Coin counting/making change
  - Notarization (by appointment)
  - Stamp sales (only in books of 20)



# Cashier's Office: Starting Fund

- The Cashier's Office issues **starting funds** to groups with SOFO accounts to enable the processing of cash transactions on site at an event being sponsored by the student group.
  - Student groups are **required** to use Norris Cashier's Office starting funds for every event where monetary transactions are expected between the groups and their patrons.
  - Starting funds are not to be used for purchases, expenses or refunds.
- Starting Fund Request Form:
  - <http://www.northwestern.edu/norris/services/cashiers-office/index.html>
  - With appropriate planning, there is no cost to request a starting fund. Charges do apply, however, if requests are submitted less than five business days before the fund is needed or if other requirements are not met by the student organization after receiving the fund.



# Cashier's Office: Debit Cards

- Debit cards serve as an additional tool that student treasurers may employ to entrust designated organizational members with the ability to make approved purchases, within University/SOFO policies and guidelines, on behalf of the student organization.
- Debit Card Forms:
  - <http://www.northwestern.edu/norris/services/cashiers-office/cashier-forms/index.html>
  - For more information, contact the Cashier's Office



# Norris Box Office

- Location:
  - Norris University Center, First Floor
  - Next to SOFO, at the Center Desk
- Hours:
  - Monday – Friday, 8am-11:30pm (or half an hour before the building closes)
- Contact:
  - 847.491.2305
  - [norrisboxoffice@northwestern.edu](mailto:norrisboxoffice@northwestern.edu)
- Website
  - <http://www.northwestern.edu/norris/services/box-office/index.html>



# Norris Box Office

- The Box Office sells tickets for student organization events. Recognized Northwestern University student organizations with SOFO accounts may request to print and/or sell tickets at the Norris Box Office (NBO) by submitting a completed request form to one of the Box Office student supervisors or the Box Office Manager.\*
- Ticket Request Forms:
  - <http://www.northwestern.edu/norris/services/box-office/index.html>
- \*Note that, while the Box Office is open all day, these forms may only be submitted while a supervisor is in the office, and supervisor hours may vary. Contact the Box Office in advance to ensure that a supervisor will be available to accept the form.

# Campus Life

- Location:
  - Norris University Center, Third Floor (SOURCE)
    - The SOURCE is a multi-purpose space where students and registered student organizations can meet to collaborate, innovate, learn, and lead.
- Hours:
  - The SOURCE is open whenever Norris is open
  - Professional staff are in the SOURCE Monday – Friday, 9am-5pm
- Contact:
  - [campuslife@northwestern.edu](mailto:campuslife@northwestern.edu)
  - 847.491.2350
  - <http://www.northwestern.edu/campuslife/index.html>



# Campus Life

- The office of Campus Life incorporates three departments, all housed in the SOURCE:
  - Student Organizations and Activities
    - <http://www.northwestern.edu/studentorgs/>
  - Leadership and Community Engagement
    - <http://www.northwestern.edu/lead-engage/>
  - Fraternity and Sorority Life
    - <http://www.northwestern.edu/fsl/index.html>
- More Campus Life Resources:
  - <http://www.northwestern.edu/campuslife/resources/faqs/index.html>





# Campus Life: Wildcat Connection

- Wildcat Connection is managed through the office of Student Organizations and Activities (not SOFO)
  - For questions regarding your organization's Wildcat Connection account, contact SOA: <http://www.northwestern.edu/studentorgs/>
  - SOA requires that student organizations renew their registration for Wildcat Connection on a yearly basis; this is unrelated to the procedures required by SOFO (such as account reconciliation)
- To view your SOFO account balance in Wildcat Connection, you may use the Finance tab on your organization page
  - If you believe there is an inaccuracy in your Finance tab, please contact SOFO



# Campus Life: Contracts

- All student groups who wish to process contracts must visit the office of Student Organizations and Activities **before** submitting the contract to SOFO
  - SOA will review your contract and have it signed by a university official (this signature is required in order to submit a contract to SOFO)
  - For more information on this process, visit their website:
    - <https://www.northwestern.edu/studentorgs/organization-officers/planning-an-event/index.html>



# Campus Life Pro Staff (Contracts)

## Office of Campus Life

Campus Life Office

Campus Life Departments

Campus Life Staff

### Campus Life

- Dr. Brent Turner – Executive Director, Campus Life
- Vacant – Administrative Assistant, Campus Life
- Bianca Bradshaw-Castillo – Administrative Assistant, Campus Life

### Leadership Development & Community Engagement

- Kelly Bencola – Director, Leadership Development & Community Engagement
- Val Buchanan – Associate Director, Leadership Development & Community Engagement
- Daniella Feijoo – Assistant Director of Leadership Development & Community Engagement

### Fraternity & Sorority Life

- Keith Garcia – Director, Fraternity & Sorority Life
- Amanda Oller – Associate Director, Fraternity & Sorority Life
- Cayce Pasko-Stanley – Assistant Director, Fraternity & Sorority Life
- Vacant – Assistant Director, Fraternity & Sorority Life

### Student Organizations & Activities

- Tracey Gibson-Jackson – Director, Student Organizations & Activities
- Joe Lattal – Associate Director, Student Organizations & Activities
- Hayley Kretchmer – Assistant Director, Student Organizations & Activities
- K. Parker Hess – Assistant Director, Student Organizations & Activities
- Audrey Meyersieck – Graduate Assistant, Student Organizations & Activities

- Contact Campus Life ([Office of Campus Life: Student Affairs - Northwestern University](#)) for assistance with contracts and the contract submission process.
- Remember that Campus Life may need **up to 2 weeks** to process a contract, so plan ahead!
- Contact:
  - SOURCE (Norris, Third Floor)
  - 847.491.2350

# Norris Event Management

- Event Management reserves spaces for student organizations in Norris University Center and across campus
- Location:
  - Norris University Center, Third Floor (Admin Office)
- Hours:
  - Monday – Friday, 9am-5pm
- Contact:
  - [norris-events@northwestern.edu](mailto:norris-events@northwestern.edu)
  - 847.491.2330
  - <http://www.northwestern.edu/norris/events/event-management/index.html>



# Norris Event Management

- Event Management offers:
  - Reservations in the Norris Center: Meeting rooms, McCormick Auditorium, Louis Room
  - Reservations at Shanley Pavilion, Cahn Auditorium, Guild Lounge, and Ryan Auditorium
  - Catering reservations throughout campus
  - Outdoor event reservations
  - One-on-one event planning and coordination
- How to Reserve Space:
  - In person at the Event Management Office (Norris University Center, Third Floor, Admin Office)
  - Online
    - <http://www.northwestern.edu/norris/events/event-management/index.html>



# Student Group Use of Vehicles

- Student organizations need their advisors to reserve vehicles on their behalf.
- Resources:
  - Procurement and Risk Management Websites:
    - [Reserve a Vehicle: Procurement and Payment Services - Northwestern University](#)
    - [safe-driver-program-8.13.pdf \(northwestern.edu\)](#)
  - Campus Life Travel Policies:
    - [http://www.northwestern.edu/studentorgs/manage-your-org/travel/index.html](#)
- All drivers must take the defensive driving course and be awarded certification.
- SOFO recommends completing the Driver Authorization and Payment Approval form with your advisor. Doing so will help in organizing a road trip, deriving an estimate of costs, and addressing driving safety issues.
  - For more information on this process, see the SOFO Transaction Overview Presentation (Bonus Transactions).

# SOFO Info – Wrap Up

You should now be familiar with the following:

## SOFO Overview

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## SOFO Campus Partners

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  - Debit Cards
- Norris Box Office
- Campus Life
  - Wildcat Connection
  - Contracts
  - Professional Staff (Contracts)
- Event Management
- Vehicle Rental