

Gator Engineering Student Organization Guideline:

Effective: August 1, 2016

Background: The UF College of Engineering (COE) has a long tradition of making available to its student organizations a UF Foundation (UFF) account for receipt of donations and reimbursing expenses towards sponsored activities. COE has also provided an Undergraduate Student Affairs staff member who works with students involved in College-level student organizations in depositing and reimbursing funds to and from a College UFF student organization account. COE has maintained a belief that students' experience in fund-raising, employer relations, and expense management provides a co-curricular educational and professional development benefit. In order to continue this tradition in COE and ensure that UFF policies are at the same time met, this document outlines the COE's policy for use of any UFF account administered in a College of Engineering department or college office. This policy is effective as of August 1, 2016. Violation of this policy will result in the offending student organization's denial of access to all UFF accounts and all of the accompanying benefits of using these accounts.

Process:

Approval of an Annual Budget

Any student organization desiring to use the any UFF account must submit an annual budget to Dr. Curtis Taylor, Associate Dean for Engineering Undergraduate Student Affairs and Ms. Yolanda Hankerson by September 1 of each year. This budget must address all anticipated upcoming year's expenses related to funds from the UFF account intended for use and should be separate from the budget for Student Government (SG) funding requested by the UF Center for Student Activities and Involvement.

Not receiving the organization's anticipated budget by this deadline may jeopardize this organization's access to the UFF account. The submitted budgets will also include the amount and source of funds available for each specific activity budgeted and intended sources (i.e., specific corporate sponsors, name and contact information of the company representative, date of the request, proposals, deadline of proposal, granting organization, etc.) of funds to be sought in fund-raising activities.

Dr. Curtis Taylor, Associate Dean for Engineering Undergraduate Student Affairs and Ms. Yolanda Hankerson will review each submitted budget and will notify each organization when its budget has been approved.

Payment and Reimbursement of Expenses

1. Coordination with Engineering Undergraduate Student Affairs Staff

The only staff member in Undergraduate Student Affairs who has a percentage of her work assignment dedicated to student organization work in use of the College of

Engineering student organization UFF account is Ms. Yolanda Hankerson. To respect the other portion of her time that does not involve student organization work, the College of Engineering requests that students make initial contact with her via email at yhank@ufl.edu in order to schedule an appointment with her in her Weil Hall office. You **MUST** schedule an appointment with Ms. Hankerson if dropping off receipts/signed travel forms, etc., requesting account spreadsheet in person (*this can be requested via email*), general questions, or any other student organization needs. Ms. Hankerson will do her very best to respond to your email request in a timely manner. This communication protocol applies for all matters related to collaboration with Ms. Hankerson. Please note, account spreadsheets may be requested once every 30 days by the student organization President or Treasurer **ONLY**.

2. Notification of Event:

Two (2) months or more in advance, please notify Ms. Hankerson of your organization's event (E-Week, E-Day, Evening with Industry, Conference or any type of travel, Homecoming, End of Semester Banquet, etc.). Organizations will need to also provide an estimated budget of the expenses, i.e., room reservations, hotels, airfare, catering, registration, table/chair rentals (PPD), t-shirts.

3. Conference Travel:

Travel Authorizations are required by UF prior to travel. In order to generate a Travel Authorization, Ms. Hankerson will need copy of conference info, including website address, agendas, (if any), registration form, airline and lodging info, etc. Upon the traveler's return an Expense Report for Travel reimbursement **MUST** be signed by the traveler prior to the approval. Once the Expense Report is received, the Associate Dean for Undergraduate Student Affairs will approve electronic submissions within four (4-6) weeks of receipt of the approval request.

Reimbursements will be issued by the UF Travel Office within four (4-6) weeks of submission of the final approvals.

Note: Make certain that each student intending to travel to a conference also have all instructors sign an Excused Absence Form at least two months prior to the travel dates.

4. Food for an Event:

Ms. Hankerson does not place food orders for student organization meetings, events, etc. Orders shall be placed and paid for by a member (s) of your organization. You are welcome to submit paid receipts for reimbursement. For more complex catering or banquet orders (i.e., Classic Fare Catering, Celebrations, Napolitanos, Domino's, Papa John's), please have vendor invoice Yolanda Hankerson, Herbert Wertheim College of Engineering, P.O. Box 116550, Gainesville, FL 32611. Vendor may request Department ID - 19010300

Beginning July 1, the University of Florida implemented the Approved Caterer Program for caterers providing food services (including alcoholic beverages, when applicable) for events on campus. The new Program will identify University-approved caterers and streamline the process of securing catering services for campus units, while enforcing existing University standards.

The list of approved caterers and information for campus departments to review before booking their catering events will be made available to all UF entities online at <https://www.bsd.ufl.edu/catering/>.

The new Program protocols will benefit the University in many ways, including ensuring best catering practices to protect the health and safety of students, faculty, staff and guests at UF; offering departments greater flexibility and variety when selecting caterers; and assuring that caterers comply with UF's rules and regulations regarding alcohol, retail, and food service.

The Approved Caterer Program will also support UF's sustainability practices encouraging caterers to follow UF's waste, recycling, composting and Styrofoam-free policies.

As a reminder, Pepsi has the exclusive pouring rights contract for UF. This means that only Pepsi products (including bottled water and Gatorade) may be served on or off campus at events as wide ranging as a faculty meeting, dean's luncheon, staff retreat, student organizations events/meetings or a special event. **Please make serious attempts to use only Pepsi products as non-Pepsi items purchased by your organization's members will not be reimbursed by UF Foundation.** Personal use is exempted from the contract. Don't forget to include a list of attendees when food is served at an event/meeting. A sign in sheet may be helpful, especially for large events.

5. Receipts for Reimbursement:

Receipts for reimbursements are to be submitted after the event/travel. In order to receive reimbursement, you will need to submit the actual receipt, UFID number, physical mailing address, proof of payment (cash receipt, copy of a cancelled check, receipt containing last 4 digits of credit/debit card used, or bank statement reflecting transaction). You may asterisk the transaction on your bank statement, but **DO NOT HIGHLIGHT!** You are encouraged to black out account numbers and other transactions. Ensure your name or parents name is reflected on bank statement. You should expect to receive reimbursement within 4-6 weeks after all information is submitted.

Please note: If purchasing giveaways for an event (E-Week, E-Day, etc.) gift cards are not reimbursable. Gift cards are always considered taxable income and therefore may not be purchased utilizing any University funding source.

6. Contributions Requiring Invoice:

In some cases, donors may ask for an invoice prior to remitting a contribution. You will need to email Ms. Hankerson (yhank@ufl.edu) with the following info to request an invoice:

Company's name

Contact person's title, email and telephone number

Contact person's complete mailing address (city, state, zip)

Expected amount of contribution

Ms. Hankerson will send invoice directly to company. It is the student organization's responsibility to follow up on the expected contribution. Check contributions should be made payable to UF and mailed to Name of student organization, P.O. Box 116550, 312 Weil Hall, Gainesville, FL 32611-6550 c/o Yolanda Hankerson. Please have the Donor indicate in the memo line of the check the fund number F001681 – EWB will indicate F012931. The memo section of the check may also include your organization's name.

When speaking or communicating with a Donor who wishes to donate via credit card, refer the donor to the University of Foundation's Gift Processing confidential toll-free number: 1-877-351-2377. The toll-free telephone number is staffed weekdays from 8am to 4:30pm. Be sure to provide the Donor with either the fund number F001681 or F012931 (whichever is applicable). Online giving is also an option. Provide donors with the following website <https://www.uff.ufl.edu/OnlineGiving/>.

7. Deposits

Funds received from conference registrations, fundraisers, etc. must be submitted to Ms. Hankerson upon receipt. **Please do not hold funds!** All checks (including money orders, cashier's checks) received, must be submitted to Ms. Hankerson within 20 days of the date of the check. No checks will be accepted for deposit in the student organization's foundation account after the 20-day deadline. Ms. Hankerson will then complete the appropriate form and deposit funds to UF Foundation.

8. Student Organization Mailboxes

The following student organizations have mailboxes in 312 Weil Hall:

SHPE	SWE
FES	EWB
Tau Beta Pi	ELC
SASE	ESAC and Engineering Day
NSBE	
Engineering Ambassadors	

Oftentimes, correspondence, checks, etc are mailed directly to 312 Weil. Please check your mailboxes regularly.

9. P-Card Purchases:

Items that can be placed on a UF P-Card:

- T-Shirts
- Airline Tickets (economy only)
- Chartered Bus
- Hotel Registration
- Conference Registration
- Domain/Website Renewal

At Ms. Hankerson's discretion she will decide whether to use a P-Card or direct bill/invoice for purchases based on UF's rules and regulations.