


2020-2021

**STUDENT
ORGANIZATION
HANDBOOK**

THE OFFICE OF
STUDENT
ENGAGEMENT



STARTING & MAINTAINING STUDENT ORGANIZATIONS

THE USF SARASOTA-MANATEE CAMPUS HAS MANY STUDENT ORGANIZATIONS, HOWEVER, IF YOU HAVEN'T FOUND ONE YET THAT FITS YOUR INTERESTS, YOU CAN ALWAYS START ONE OF YOUR OWN!

THIS GUIDE WILL HELP YOU ON YOUR WAY TO STARTING A RECOGNIZED STUDENT ORGANIZATION AT USF SARASOTA-MANATEE.

STEP ONE

FIND FOUR FRIENDS

In order to become a Recognized Student Organization, you will need to have at least 5 current students who are committed to achieving the purpose of the organization.

STEP TWO

SEEK OUT AN ADVISOR

Your group will need to find a current faculty, staff or administrator at USF who has a current USF Net ID to advise your student group. Your advisor should be someone that has the same goals and vision as your group and is willing to support your organization in order to make sure the group is as successful as possible.

STEP THREE

CREATE A CONSTITUTION

It is important to have a specific idea of what your organization wants to accomplish and a plan of action. It is also important that your group is different than any other organization that is currently recognized. Your constitution is an agreement between the club's leadership and its members and will include a short purpose statement, a mission statement, as well as a guide to elections, membership, and day-to-day operations of the organization. You can find the Constitution Guidelines & Template on BullSync.

STEP FOUR

SUBMIT YOUR REQUEST VIA BULLSYNC

LOG-IN TO BULLSYNC USING YOUR NET-ID & PASSWORD



CLICK ON "ORGANIZATIONS" AT THE TOP OF YOUR SCREEN

CLICK THE WHITE BUTTON TITLED "REGISTER AN ORGANIZATION" AND THEN CLICK THE BLUE BUTTON TITLED "REGISTER A NEW ORGANIZATION"



FILL OUT NEW CLUB FORM



As soon as everyone has verified their position, The Coordinator of Student Organizations & Leadership will contact the group and their advisor to set up an approval meeting. Once the meeting has taken place, the group will be fully approved and will be granted a \$500 "New Club" budget.

BENEFITS OF RECOGNITION

1. the opportunity to receive A&S Funding
2. the opportunity to request funds from SGA (some restrictions apply)
3. access to university contracts
4. use of the USF Sarasota-Manatee facilities, including room and equipment rental, at little to no cost
5. marketing assistance & design

MAINTAINING RECOGNITION

Each year, existing Student Organizations are required to fulfill a few responsibilities in order to maintain their status as a recognized student organization.

Re-register with the Office of Student Engagement

The Coordinator of Student Organizations & Leadership organizes this process and the club will be contacted via email with specific details, prior to the start of Fall semester.

The re-registration process is your time to review and update your organization's leadership, roster, and constitution. An executive member will have the responsibility to complete the online renewal form through BullSync.

Attend Recognized Student Organization Training

This training is held once in Fall clubs are expected to attend this training.

Annual Budget Preparation

Participate in the yearly Budget Information session, held during the spring semester.

RESERVATIONS & EVENT REQUESTS

In order to make sure that each event or meeting is as successful as possible, the OSE has put some guidelines into place. These guidelines ensure that:

- You receive everything you need for your meeting/event
- Your meeting/event is posted on OrgSync for everyone to see
- The appropriate departments, such as Facilities or Reservations, are contacted prior to your event

All Recognized Student Organizations are required to follow OSE policy in order to hold an event OR meeting both ON AND OFF campus.

Please Note: The OSE will NOT approve any event/meeting requests that take place during "Finals Week" of Fall or Spring semester.

EVENT INFORMATION

Your first step is to gather all of the information you will need in order to "Create an Event" via BullSync. Here is what you will need to know in order to create your event:

- What would you like to name your Event (or meeting)?
- What date would you like hold your Event (or meeting)?
- Would you like to reserve space on campus, and if so, where?
 - *If you would like to reserve Selby, the Rotunda, or the Courtyard, it is STRONGLY recommended that you contact the OSE to check on the availability of these spaces!*
 - Will you require RSVP prior to your Event (or meeting)?

EVENT DEADLINES

Next, you'll need to make sure that you are within the deadline to create your event.

6-8 WEEKS

Any event that you would like to hold in the Rotunda, Courtyard, Student Commons, or Selby Auditorium and does NOT include a contract or purchase order.

Any event that will include a contract or purchase order needs to be created on BullSync at least 6-8 weeks in advance.

4 WEEKS

3 BUSINESS DAYS

- Any meeting or event that just requires a classroom reservation
- Reserving a table in Student Commons

CREATE YOUR EVENT

1. In order to reserve your space on campus and get your event approved, you'll need to create your event on BullSync. Log-in to BullSync and click on your organization, under "Memberships".

2. Click "Manage Organization" in the upper right hand corner.

7. After your form is submitted, it will go to the Coordinator of Student Organizations & Leadership. You will be notified of the status of your event via BullSync within 1-2 business days. .

3. Open the Organization Tools Menu by clicking on the three lines underneath BullSync.

6. Completely fill out the form.

5. You are now on the "Manage Events" page. Click on "Create Event" located in the blue box in the upper right hand corner.

4. Click on Events. The third option in the drop down menu.

ATTENDANCE TRACKING FOR STUDENT ORGANIZATIONS

As an organization officer with full access to manage events, you have the ability to track event participation to keep track of who is attending the events and meetings your organization hosts. The first step in this process is, of course, to create your event!

Once your event has been approved, you can manage RSVPs and invitations and finally track the attendance at your event.

WHY IS TRACKING ATTENDANCE SO IMPORTANT?

With the consolidation to OneUSF and one Student Government, attendance tracking has now become a requirement for future A&S fee funding.

After every meeting and event, your organization will need to upload your attendance to your event on BullSync. SGA will do rolling audits on all Club and Organization attendance throughout the fiscal year. Additionally, this information will be part of your 2021-2022 budget request.

From the USF Student Government Statutes, Title 8 Finance Code:

Chapter 801 A&S Funding Eligibility

801.5.3. The event attendance of USF students shall be recorded.

Chapter 802 Additional Policies & Procedures:

802.9. Audits

802.9.1. SBS or business office equivalent shall, on a biweekly basis, send a list of A&S Funded events to the Senate President and Campus Council chair for distribution to Senators and Campus Council members in the fall and spring semesters.

Chapter 803 A&S Annual Budget Procedure

803.4. All student organizations are required to submit a performance report as part of their budget request. The performance report shall include, but is not limited to:

803.4.1. The organization profile (mission, officer listing, and membership).

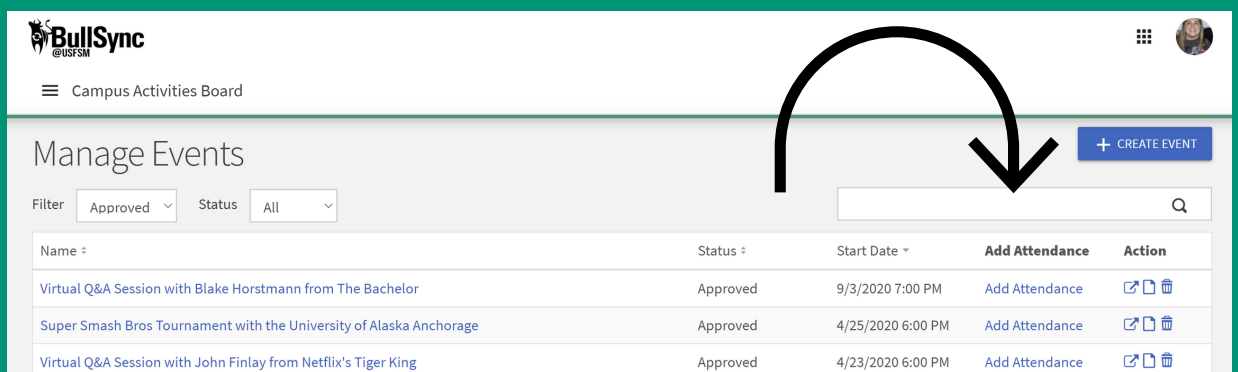
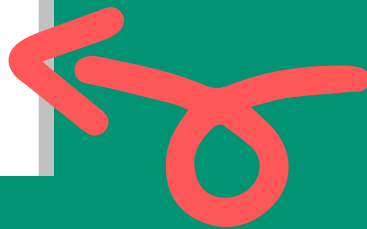
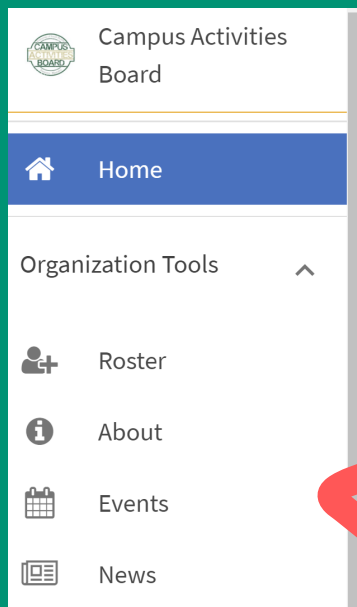
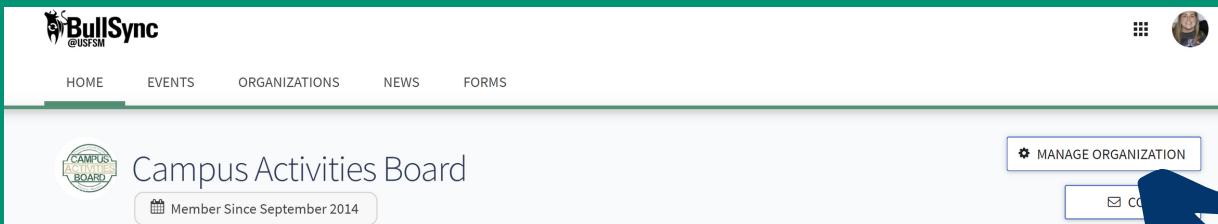
803.4.2. Individual descriptions of projects, programs, and services.

803.4.3. Information on meetings conducted during the past fiscal year.

803.4.4. Additional items may be requested by a majority vote of the Senate Finance Committee or ASRC.

WHERE TO TRACK ATTENDANCE?

To track event participation, switch to the Manage view of Engage using your switchboard, and select your organization. Use the organization tool menu to open the "Events" tab. Click the event you want to manage and then click Track Attendance.



TRACKING PARTICIPATION MANUALLY

The first method to assign participation to a user is to click **+Add Attendance** button. Here, you have three tabs with different options for adding event participation.

INVITATIONS

On the Invitations tab, you will see a list of users that were invited to the event. For each user, select the appropriate level of attendance (**Attended**, **Absent**, **Excused**, or **N/A**). You can also add additional comments about a user's attendance, if applicable.

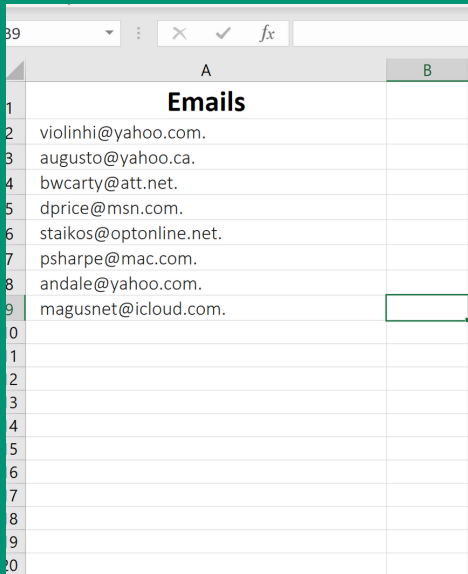
TEXT ENTRY

On the **Text Entry** tab, you can enter attendee information in bulk, using either the users' campus email address. So, if you collect users' email addresses during sign-in at an event, you can copy and paste that information into the text entry field and add that attendance data. For each entry, you can also choose the attendance status. Enter up to 500 attendees using this method.

FILE UPLOAD

The File Upload tab allows you to enter a .csv or .txt file containing attendees' email addresses. Select the identifier type, upload the file, assign the proper level of attendance credit and click Upload. Please limit attendance uploads to a maximum of 1,000 records.

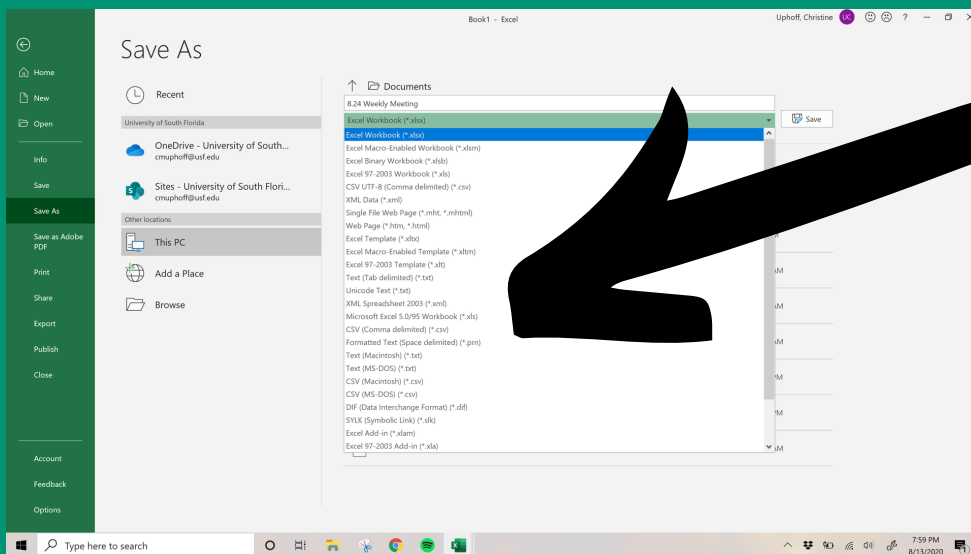
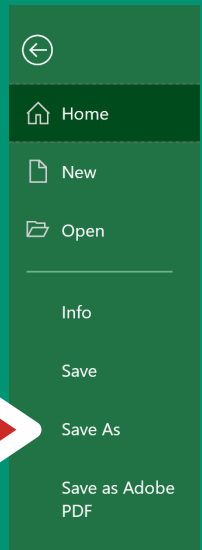
HOW TO TURN AN EXCEL DOCUMENT INTO A .TXT FILE



| | A | B |
|---|------------------------|---|
| 1 | Emails | |
| 2 | violinhi@yahoo.com. | |
| 3 | augusto@yahoo.ca. | |
| 4 | bwcarty@att.net. | |
| 5 | dprice@msn.com. | |
| 6 | staikos@optonline.net. | |
| 7 | psharpe@mac.com. | |
| 8 | andale@yahoo.com. | |
| 9 | magusnet@icloud.com. | |
| 0 | | |
| 1 | | |
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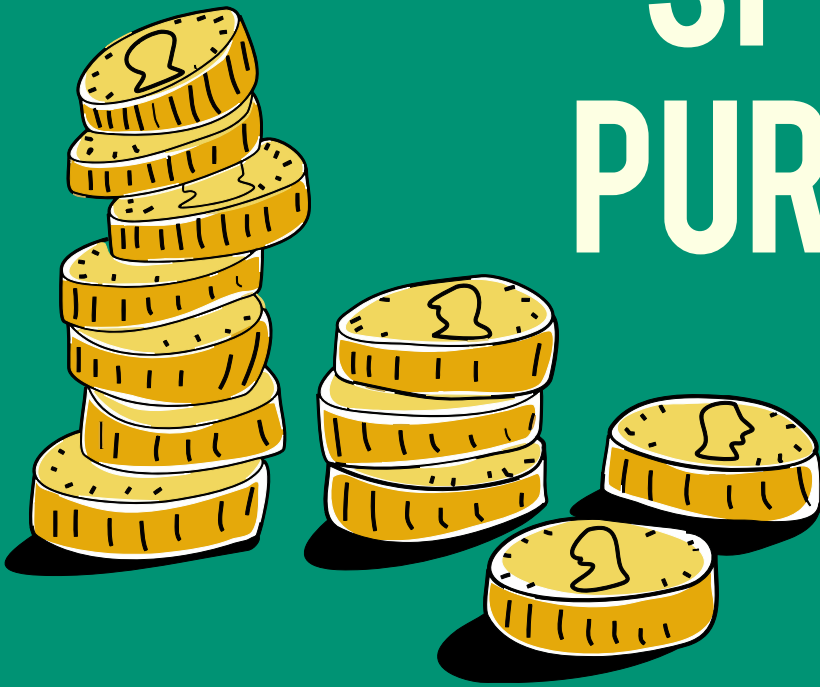
You should have an excel sheet with all the emails you would like to upload into your event for attendance

Once you are done, you will select the "Save As" option under the file tab



Under the save file options, you will go down the list until you see the file type: Text (Tab delimited)(*.txt). Then hit save. Now you have a .txt document ready for upload.

YOUR GUIDE TO A&S FEES, BUDGETS, SPENDING & PURCHASING



IN THIS GUIDE YOU'LL
LEARN HOW YOUR CLUB
IS FUNDED, HOW TO
MANAGE YOUR FUNDS,
AND HOW TO SUBMIT A
PURCHASE REQUEST

WHAT ARE A&S FEES?

Activity and Service Fees (A&S) are fees included in each student's tuition payment and are used to fund student programming, student organizations, Student Government, and a variety of other student support entities. A&S fees are allocated and monitored by students elected or appointed to the University of South Florida Sarasota-Manatee's Student Government.

WHO SHOULD MANAGE OUR FUNDING?

The Financial Officer of an organization is responsible for the proper and legal use of A&S funding. Your Financial Officer must be on the executive board of the organization and is usually the Treasurer.

Your Financial Officer must meet the following requirements:

- Explain all pertinent information to the officers and members of their organization, such as any upcoming events and deadlines.
- Must read the Finance Code Title 8 of the SG Statutes to ensure the organization is acting in accordance with the SG Constitution, Statues, and University policies.
- Must fully understand all the rules and regulations within Title 8 of the SG Statutes (the acceptance of Purchase Requests depends on this).
- Maintain accurate records of the organization's financial activity and hand the information gathered to the succeeding Financial Officer.
- Help manage the storing and securing all property purchased with A&S funds. The property must be stored on campus and available for inventory audits by our office and by USF.

ACCESSING YOUR FUNDING

If your organization is eligible for funding via A&S fees, you will take part in the annual Budget Request process that takes place during the spring semester each year.

Your Student Government Association is responsible for this process and will reach out to you prior to the start of the process.

Once budgets have been allocated, your organization will access and utilize your funding via BullSync.

IS MY CLUB ELIGIBLE FOR A&S FEE FUNDING?

In order to be eligible for A&S funding, your organization must meet all of the following criteria:

- Must be open to all USF students regardless of major, age, marital status, national origin, disability, sex, race, religion or sexual orientation
- Cannot charge dues of any kind
- Cannot charge University of South Florida students to attend any A&S funded event
- Must have at least 5 registered student members
- Must be recognized within the Office of Student Engagement prior to submitting a Funding Request.

HOW DO WE SPEND FROM OUR BUDGET?

When your budget has been allocated, spending may begin in July and continues through April, each year.

Once you have identified what you would like to spend money on, your club will need to submit a Purchase Request via BullSync.

WHAT IS A PURCHASE REQUEST?

A Purchase Request is something that your club will need to submit if you would like to spend money from your budget. Your club cannot spend money without first submitting a Purchase Request.

The reason Purchase Requests are so important is because the Office of Student Engagement will ensure that your purchasing is complete by paying for whatever you are requesting. The Purchase Request notifies the department that a purchase needs to be made.

If a Purchase Request is not received far enough ahead of time, or at all, the department will not be aware that your club would like to make a purchase and they will not be allowed to complete your purchase.

****Do not ever pay for something out of pocket. You will not be reimbursed. USF System policy will not allow reimbursements without prior approval.****

WHEN SHOULD I SUBMIT MY PURCHASE REQUEST?

OPTION ONE

YOUR REQUEST CAN BE PURCHASED USING A CREDIT CARD

If your requested purchase can be paid for with a Visa Credit Card, then you will need to submit your Purchase Request **NO LESS THAN 2 WEEKS** prior to when you need your purchases in hand.

Make sure to include things like processing, shipping, etc. when identifying the date that you need an item!

****It is YOUR responsibility to find out what payment method your purchase requires PRIOR to submitting your request. If you need help with this, make sure to contact the Office of Student Engagement as soon as you need assistance!****

WHEN SHOULD I SUBMIT MY PURCHASE REQUEST?

OPTION TWO

YOUR REQUEST CAN BE PURCHASED WITH A CHECK OR PURCHASE ORDER

If your requested purchase requires payment via Check or Direct Deposit, then you will need to submit your Purchase Request **NO LESS THAN 6 WEEKS** prior to when payment is due.

Checks are typically required for speakers, coach busses, tickets for theme parks or sporting events, musicians, comedians, entertainers, vendors who provide a service (food trucks, deep sea fishing, Savage Race, novelty crafts, etc.)

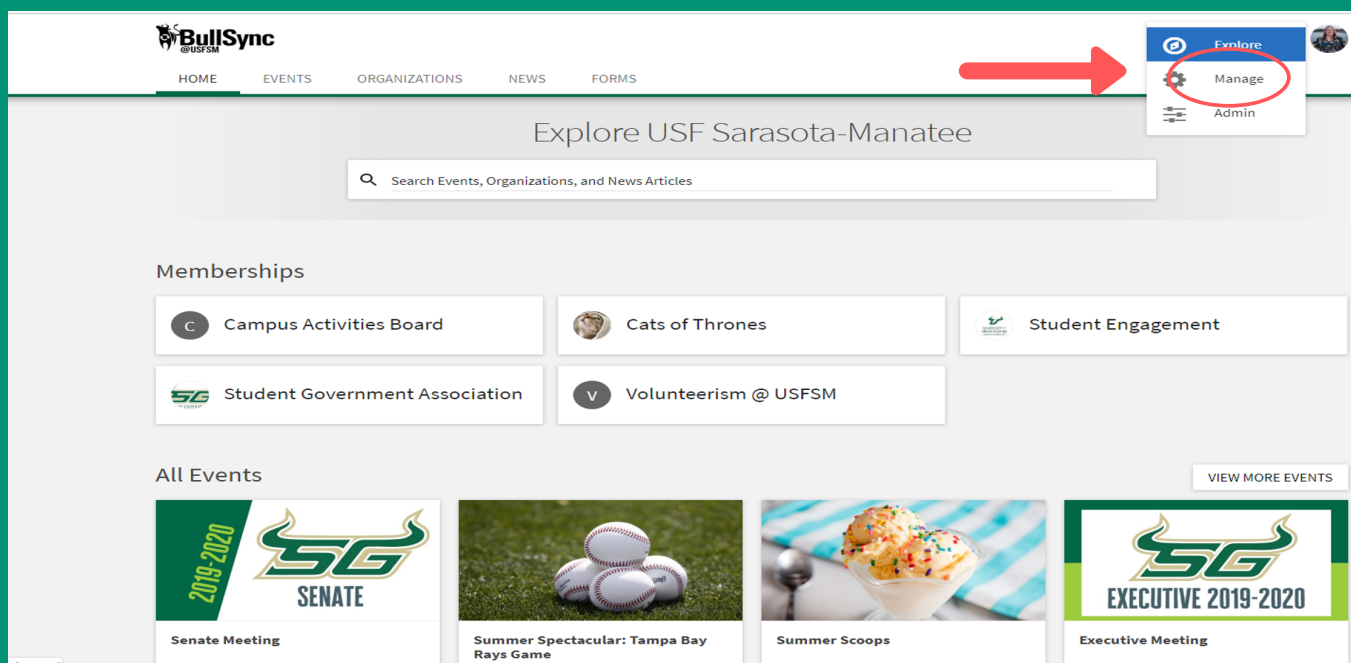
You will need to include vendor information and a quote from the vendor in your Purchase Request. The request will be denied if it does not include this information!

HOW DO I SUBMIT MY PURCHASE REQUEST?

Once you know what you would like to buy, it's payment method, and the matching submission deadline - you are **FINALLY** ready to start your Purchase Request!

STEP 1

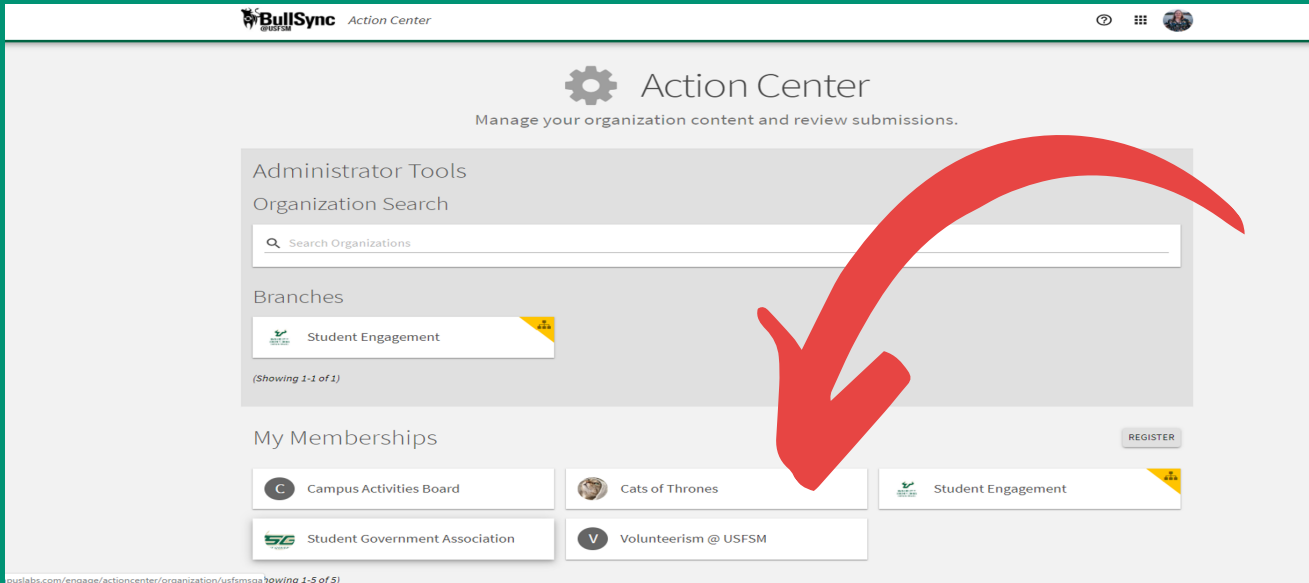
Log-in to BullSync and head to the upper right hand side (by your account photo) and go to "Manage" to get access to your Organization.



The screenshot displays the BullSync website interface. At the top left, the BullSync logo is visible. The navigation menu includes HOME, EVENTS, ORGANIZATIONS, NEWS, and FORMS. A red arrow points to the user profile menu in the upper right corner, which contains options for Explore, Manage, and Admin. The 'Manage' option is circled in red. Below the navigation, the page title is 'Explore USF Sarasota-Manatee'. A search bar is present with the placeholder text 'Search Events, Organizations, and News Articles'. The 'Memberships' section lists several organizations: Campus Activities Board, Cats of Thrones, Student Engagement, Student Government Association, and Volunteerism @ USFSM. The 'All Events' section features a grid of event cards, including 'Senate Meeting', 'Summer Spectacular: Tampa Bay Rays Game', 'Summer Scoops', and 'Executive Meeting'. A 'VIEW MORE EVENTS' button is located to the right of the event grid.

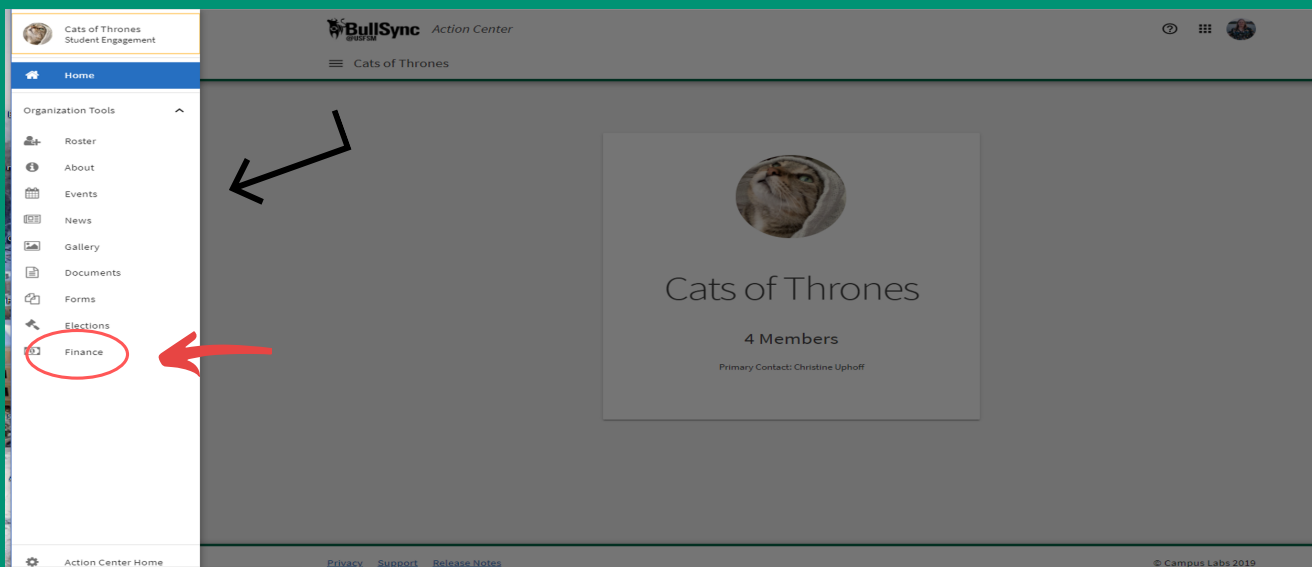
STEP 2

Once in "Manage", go down to "My Memberships" and select the Organization you are making a Purchase Request for.



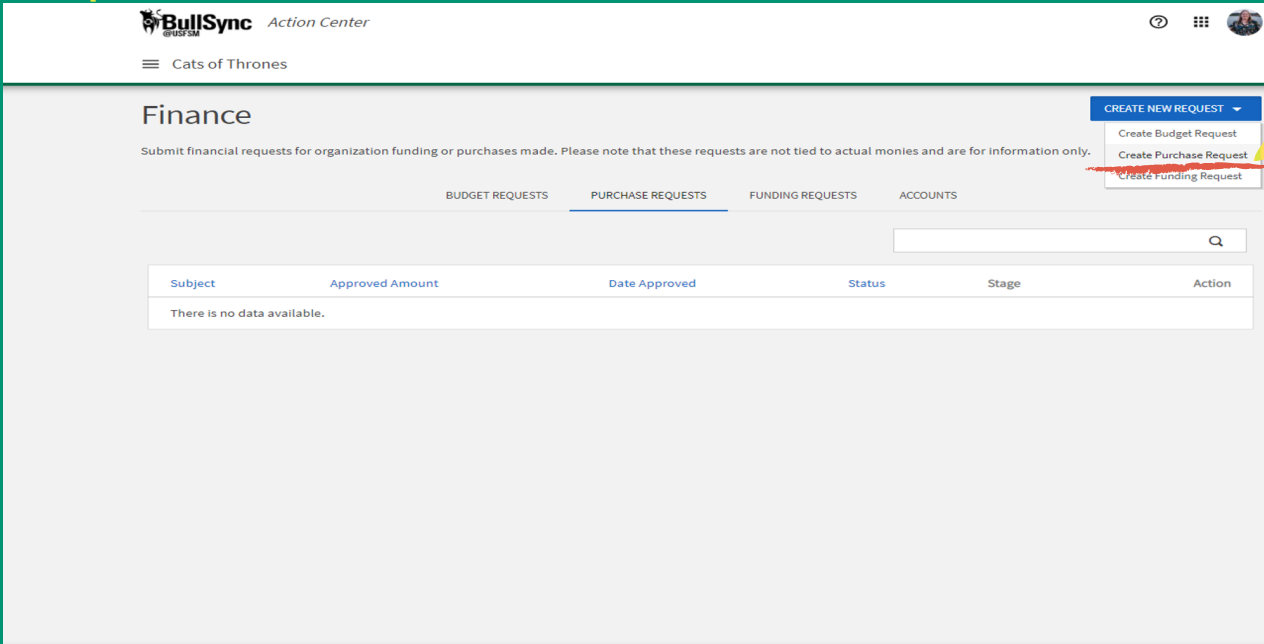
STEP 3

When you are in your Organization, head to the upper lefthand side and click the three lines next to your Organization's name. From there you can access the Finance portal.



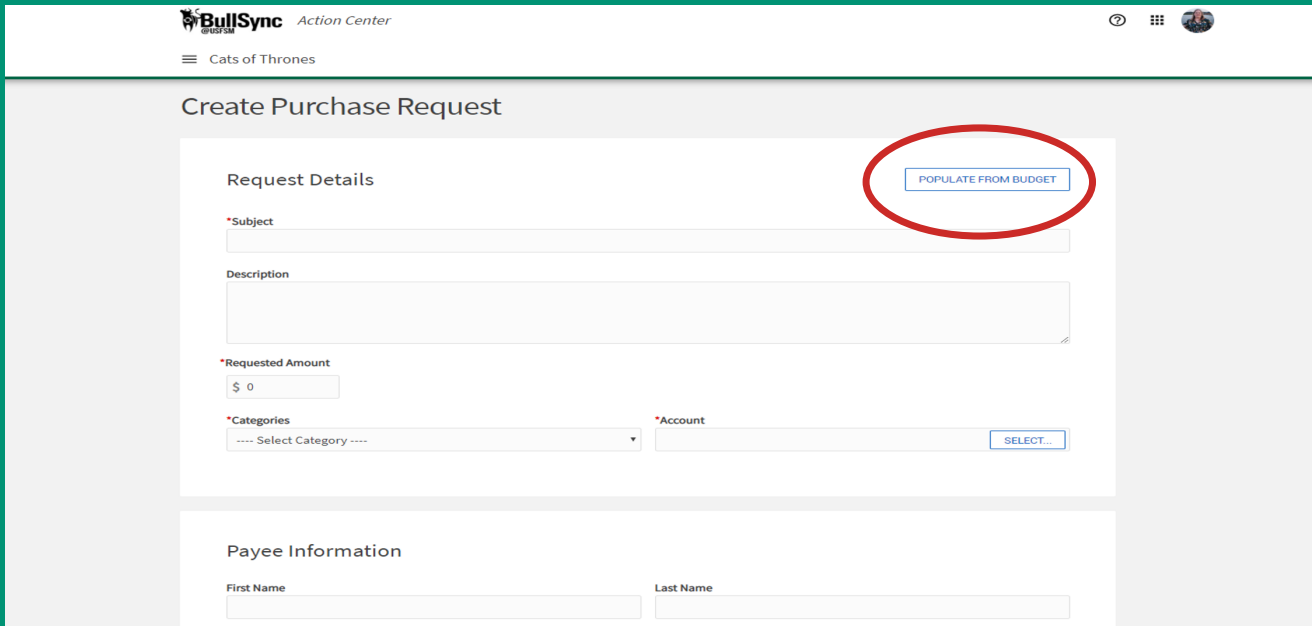
STEP 4

This will open the Finance Portal. You can view all of your Requests here. On the right side, go to the drop down and select "Create Purchase Request"



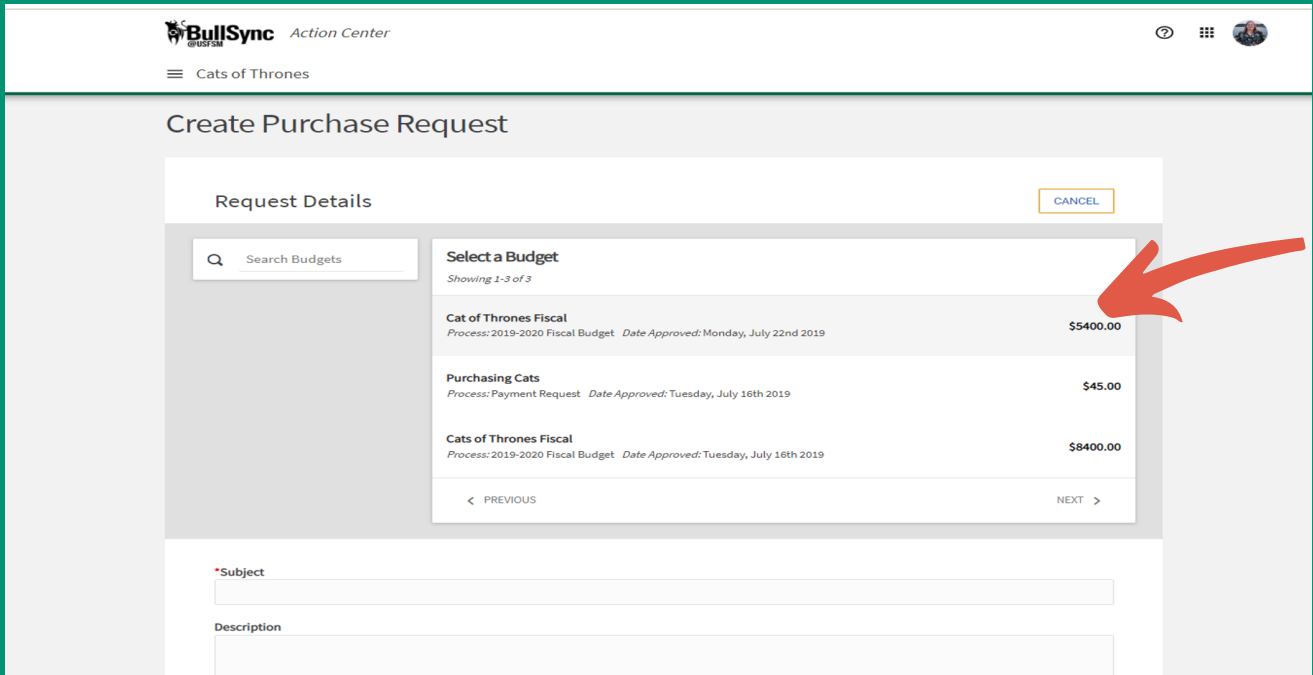
STEP 5

When filling out a Purchase Request, the first step is clicking on the "Populate From Budget" button. This will pull up your budget so you can select the correct line item you are requesting from.



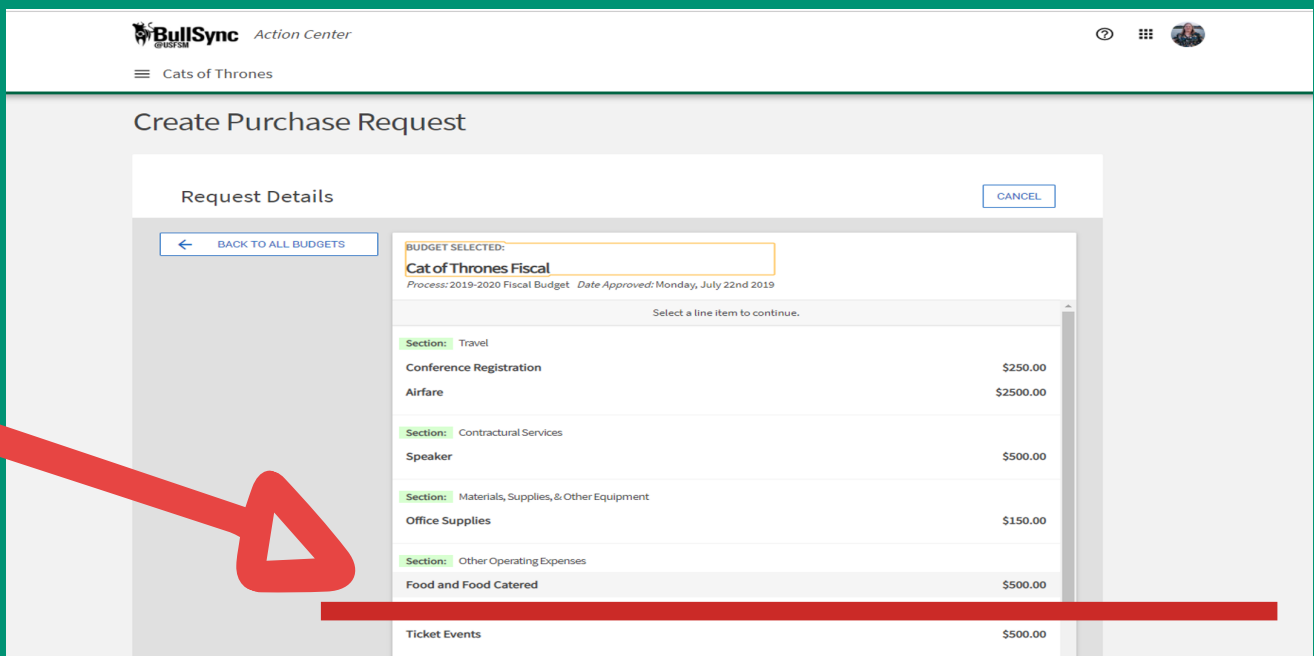
STEP 6

Select the budget you would like to request funds from.



STEP 7

Please select the correct line item you wish your purchase to come from. An example would be an order from Dominos should come from "Food & Food Catered".



STEP 8

How to fill out the Purchase Request Form:

- Subject should be changed to the title of your Purchase Request
- The Description should be the purpose of your request.
- Fill out the amount of money you are requesting for this purchase
- Select a category that matches your line item
- The Account should match the budget you selected.

The screenshot shows the 'Create Purchase Request' form with the following fields and annotations:

- Request Details:** Includes a 'POPULATE FROM BUDGET' button.
- Selected Budget:** Cat of Thrones Fiscal
- Selected Line Item (if applicable):** Food and Food Catered
- *Subject:** Food for the Red Wedding (Annotated with a red arrow and the text 'Edit with Title')
- Description:** To provide Food to student guests attending the Red Wedding event. (Annotated with a pink arrow and the text 'Purpose of Purchase')
- *Requested Amount:** \$ 175.00 (Annotated with a blue arrow and the text 'Amount Requesting'). Below it, it says '\$325.00 remaining of \$500.00 approved'.
- *Categories:** A dropdown menu is open, showing options like 'Computer and Tech', 'Contractual Services', 'Food Related', 'Marketing', etc. (Annotated with a red arrow and the text 'Select Category that matches line item')
- *Account:** Cats of Thrones (Annotated with a red arrow and the text 'Select Category that matches line item')
- Last Name:** (Empty field)
- Street:** (Empty field)

Select Category that matches line item

STEP 9

How to fill out the Purchase Request Form:

- The Payee information should be from the Approved Vendor List
- Use the "Street Continued" for the Phone Number
- Make sure you Check the box about the approved vendor list before moving forward

The screenshot shows a 'Payee Information' form with the following fields: First Name, Last Name, Street, Street Continued (Optional), City, State/Province, and ZIP/Postal Code. A red arrow points to the 'Street Continued (Optional)' field with the text 'Use this line for vendor phone number'. Another red arrow points to a blue box containing a link with the text 'Clickable link to Approved Vendor List'. Below the form, there is an 'Additional Information' section with a blue box containing the text: 'Please review the Approved Vendor List and make sure your above vendor is part of this list. Click here for list.' Below this, there is a checkbox with the text: 'By checking this box, I confirm the Payee information above is listed on the Approved Vendor List provided by OSE.' A red arrow points to this checkbox with the text 'Box that needs to be checked for Vendor List'. Below the checkbox, there is a section titled 'Important Request Deadlines' with the text: '*Payment Requests cannot be denied if they do not meet these deadlines*' and a list of deadlines: 'Everyday purchases with PCard - 2 weeks prior to date needed', 'Copy Center charges 1 week prior', and 'Contracts, Agreements, and Checks - 6 weeks prior to date needed'.



Approved Vendor List Document

Example of filled out Payee Information:

Payee Information

First Name
Panera Bread

Last Name

Street
2821 University Pkwy

Street Continued (Optional)
941-351-9300

City
Sarasota

State/Province
FL

ZIP/Postal Code
34243

Additional Information

Please review the Approved Vendor List and make sure your above vendor is part of this list.
Click [here](#) for list.

* Required
 By checking this box, I confirm the Payee information above is listed on the Approved Vendor List provided by OSE.

Important Payment Request Deadlines
Payment Requests can and will be denied if they do not meet these deadlines

- Everyday purchases with Pcard/Creditcard - 2 weeks prior to date needed
 - Copy Center charges 1 week prior
- Contracts, Agreements, and Checks - 6 weeks prior to date needed

STEP 10

Follow the form and answer all questions with information about your purchase. The date question must be answered in date format

Describe what you need purchased. Itemize too if possible. Be descriptive.

By checking this box, I confirm the Payee information above is listed on the Approved Vendor List provided by OSE.

Important Payment Request Deadlines
Payment Requests can and will be denied if they do not meet these deadlines

- Everyday purchases with Pcard/Creditcard - 2 weeks prior to date needed
 - Copy Center charges 1 week prior
- Contracts, Agreements, and Checks - 6 weeks prior to date needed
- Travel (airfare, hotel, rental car, gas, registration, etc.) - 6 weeks prior to first purchase needed
 - If requesting only mileage - 1 week prior to travel date. Reimbursement occurs after travel date.

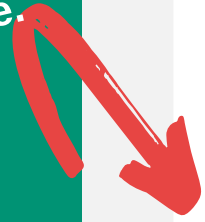
* Who is the contact for this purchase?
Please enter in the club contact for this purchase. This will be the point of contact if there are any issues during the process.
Walder Frey-line

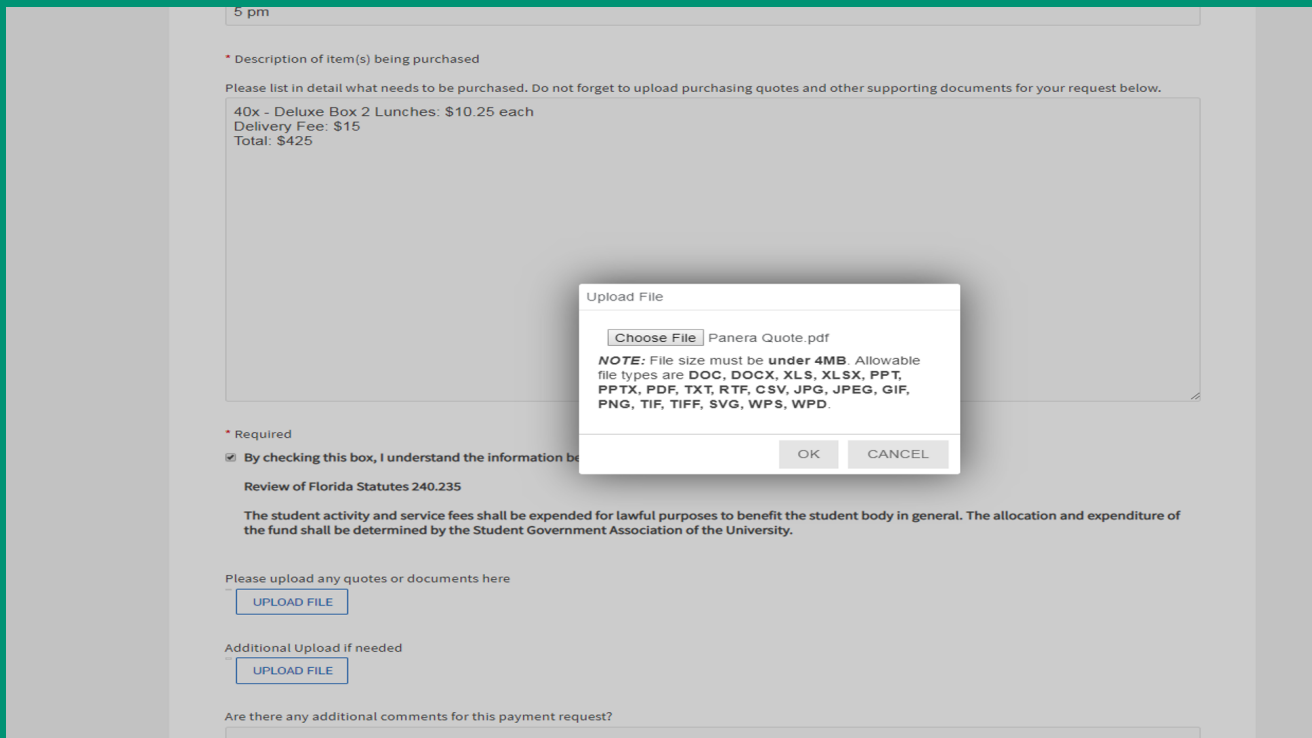
* Email Address
Please enter the email address of the club contact.
Walder@houseoffrey.com

* What date is your event?
11/24/2019

* What time does your event begin?
5 pm

* Description of item(s) being purchased
Please list in detail what needs to be purchased. Do not forget to upload purchasing quotes and other supporting documents for your request below.
40x - Deluxe Box 2 Lunches: \$10.25 each
Delivery Fee: \$15
Total: \$425





STEP 11

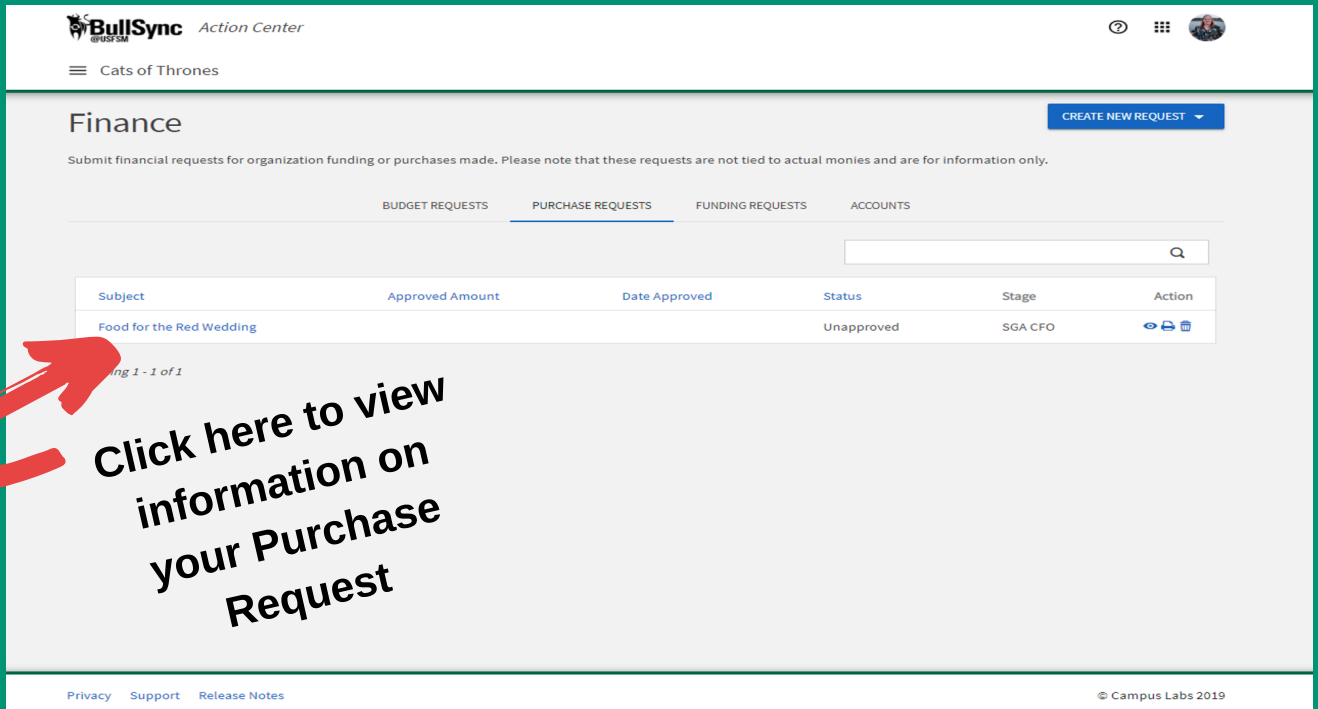
When you have the form filled out, you need to make sure to attach your quote, email, or documentation for the purchase. There are two uploads provided. If you need to upload more, you can send the information to cmuphoff@usf.edu

Examples are:

- Screenshot from Amazon Cart
- Email from Vendor with details
- Screenshot of website

STEP 12

Once you have fully submitted your Purchase Request, you will be brought back to the Finance Home Page. Here you can look up any Purchase Requests to see what stage they are in by clicking on the hyperlink of the Purchase Request.



BullSync Action Center

Cats of Thrones

Finance

Submit financial requests for organization funding or purchases made. Please note that these requests are not tied to actual monies and are for information only.

BUDGET REQUESTS PURCHASE REQUESTS FUNDING REQUESTS ACCOUNTS

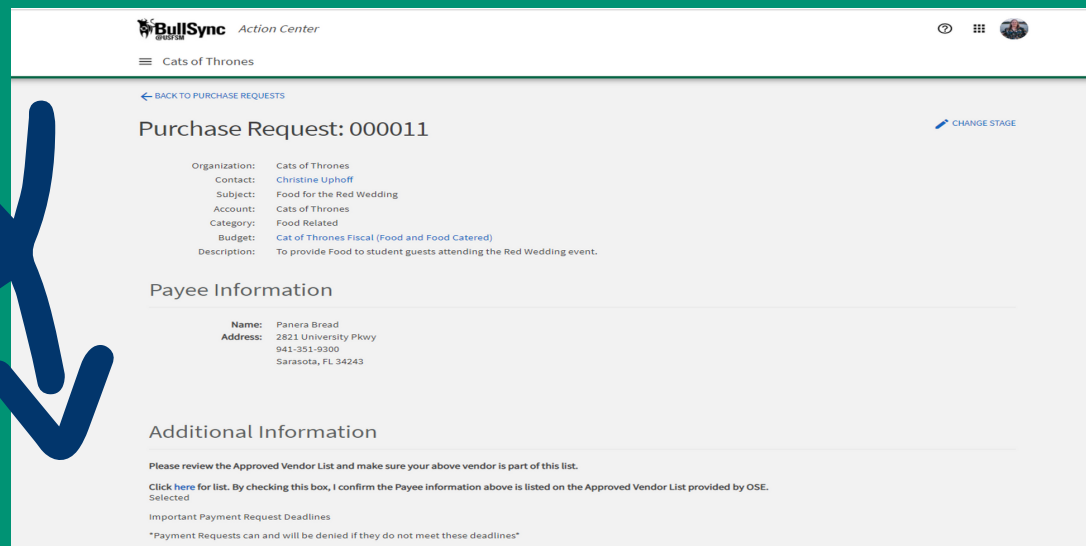
| Subject | Approved Amount | Date Approved | Status | Stage | Action |
|--|-----------------|---------------|------------|---------|--------|
| Food for the Red Wedding | | | Unapproved | SGA CFO | |

Showing 1 - 1 of 1

Privacy Support Release Notes © Campus Labs 2019

Click here to view information on your Purchase Request

This is what your submitted Purchase Request looks like:



BullSync Action Center

Cats of Thrones

[← BACK TO PURCHASE REQUESTS](#)

Purchase Request: 000011

[CHANGE STAGE](#)

Organization: Cats of Thrones
Contact: Christine Uphoff
Subject: Food for the Red Wedding
Account: Cats of Thrones
Category: Food Related
Budget: Cat of Thrones Fiscal (Food and Food Catered)
Description: To provide Food to student guests attending the Red Wedding event.

Payee Information

Name: Panera Bread
Address: 2921 University Pkwy
941-351-9300
Sarasota, FL 34243

Additional Information

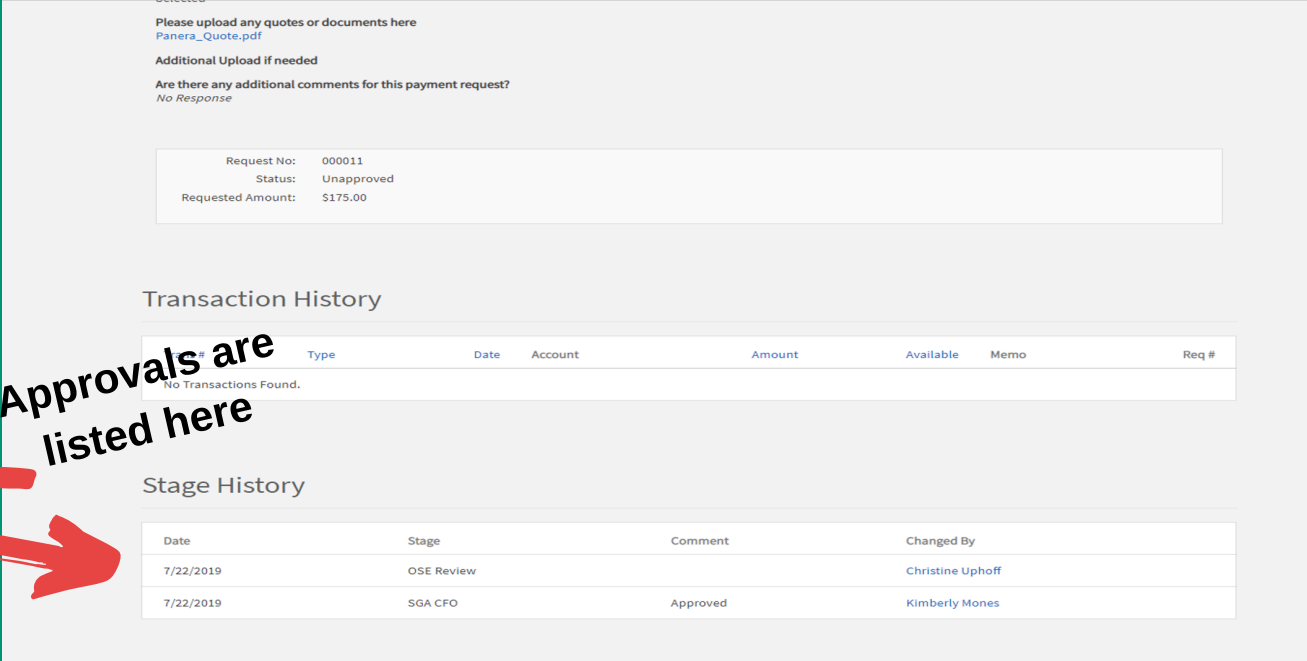
Please review the Approved Vendor List and make sure your above vendor is part of this list.
[Click here for list.](#) By checking this box, I confirm the Payee information above is listed on the Approved Vendor List provided by OSE.
Selected

Important Payment Request Deadlines
Payment Requests can and will be denied if they do not meet these deadlines

You can scroll down on your Purchase Request to see all the information

STEP 13

At the bottom of the page it will tell you who has approved the request. Once it has been approved by OSE and the SGA CFO, the SGA CFO will email your USF Email address that the Purchase Request has been approved.



The screenshot displays a web interface for a purchase request. At the top, there is a section for document uploads with the text "Please upload any quotes or documents here" and a link to "Panera_Quote.pdf". Below this is an "Additional Upload if needed" section with the question "Are there any additional comments for this payment request?" and the response "No Response".

A summary box contains the following information:

- Request No: 000011
- Status: Unapproved
- Requested Amount: \$175.00

Below the summary box is a "Transaction History" section with a table that currently shows "No Transactions Found.".

At the bottom is a "Stage History" section with a table showing the following entries:

| Date | Stage | Comment | Changed By |
|-----------|------------|----------|------------------|
| 7/22/2019 | OSE Review | | Christine Uphoff |
| 7/22/2019 | SGA CFO | Approved | Kimberly Mones |

A red arrow points from the text "Approvals are listed here" to the Stage History table.

When the item(s) are fully purchased, and we know the exact amount that was used to fulfill the request, we will fully approve the Purchase Request with the actual amount so it can reflect the true cost in your budget.

NOW WHAT HAPPENS?



The Student Government CFO is responsible for reviewing all Purchase Requests. You will receive an email of the status of your request and let you know if additional information is needed.

Once the request is approved, OSE will contact you to let you know the details regarding your purchase. For example, if you are purchasing food, you will be asked to call and place the order with your vendor so that an OSE staff member can call and pay for your food on the day it is needed.

When the item(s) are fully purchased, and we know the exact amount that was used to fulfill the request, we will fully approve the Purchase Request with the actual amount so it can reflect the true cost in your budget.



FINAL REMINDERS

You are responsible for submitting an itemized invoice or receipt to the Coordinator of Fiscal Operations (located within the Office of Student Engagement) **NO LATER** than 2 business days after your event or travel (or after the item was purchased if it was not for an event).



The USF System requires that each invoice includes the following:

- Vendor's Name & Address
- Date of Purchase
- Itemized list of items that were purchased & how many of each was purchased
- The cost of each item
- Total cost



****If your payment request is denied, you will receive an email from OSE with additional steps.*****



IF A RECEIPT IS NOT SUBMITTED WITHIN 2 BUSINESS DAYS, YOUR ORGANIZATION'S BUDGET WILL BE FROZEN UNTIL IT IS RECEIVED

VIRTUAL RSO CONFERENCE TRAVEL GUIDE

Students Organizations have the opportunity to register for a virtual conference with their travel funds allocated to them by Student Government.

Due to the travel restrictions from the University, we will only be able to grant registration fees for virtual conferences.

Student organizations who currently have travel funds allocated to their 2020-2021 budget may use these funds to register for a virtual conference. This policy change is only in place while the university continues to enact travel restrictions due to COVID 19.

Please keep in mind that we cannot address every “what if” and so this document is not all inclusive. If you have questions or concerns regarding this grant, please reach out to Christine Uphoff (cmuphoff@usf.edu).

Individuals will only be allowed to request up to the maximum of \$250 per registration and \$7,000 per year per organization for a virtual conferences due to Student Government legislation.

VIRTUAL TRAVEL REGULATIONS

- Per Title VIII Finance Code: Students and/or student organizations that have or will receive full or partial funding for their travel expenses from another USF Department/Entity shall not be eligible for the SG Travel Funding.
- Students requesting registration for a virtual conference can be awarded a maximum of \$250.00 per registration. With an organization cap of \$7,000 per fiscal year.
- Registration will be pre-paid only
- If the registration is more than the maximum of \$250.00 and or more than the \$7,000 total per organization, students will need to reimburse the University the difference prior to the University paying for the registration.

IN ADDITION:

- Students must be registered USF students both at the time they submit the purchase request and at the time they travel to their conferences
- Students traveling during the summer terms that are not enrolled in classes during the summer terms must have been enrolled for both the previous spring semester and the following fall semester

TRAVEL DEADLINE

Planning, submitting, and approving travel is a process that is partly done by the student, partly done by the Office of Student Engagement, and approved by USF Tampa.

Since this is a multi-step process and we want to make sure that your travel experience is the best it possibly can be.

Remember to consider submitting your application earlier if you need to pre-pay some of your conference registration prior to the University registering your conference.

We require ALL virtual conference purchase requests to be submitted no later than 2 weeks prior to the conference.

TRAVEL REQUEST: SUBMISSION & APPROVAL PROCESS

1

Submit a purchase request for the virtual conference registration through your travel budget line item in your organization's budget.

It can take up to 5 -7 business days to process the purchase request.

If the registration is over the \$250 maximum, you will need to work with Christine Uphoff on how to pre-pay the difference prior to the University registering you for the conference

YOU SHOULD NOT REGISTER YOURSELF FOR THE CONFERENCE. THE UNIVERSITY WILL NOT REIMBURSE YOU. .



AFTER SUBMITTING YOUR TRAVEL REQUEST FORM

The Office of Student Engagement will reach out to the student who submitted the request and go over the procedure for registration of the virtual conference.

At the meeting, we will go over if you need to pre-pay for the registration and how the pre-paid registration will work.

2

BOOKING TRAVEL

This is only pre-payment. There will not be any reimbursements for this virtual conferences.

The Office of Student Engagement will only cover the maximum totals listed on page 2 of this document.

You will be required to pre-pay to the University the difference if the cost of registration is above the \$250 maximum prior to the University booking the registration.

Organizations can only request a maximum of \$7,000 per fiscal year.


3

FINAL REMINDERS




Organizations should already have travel funds within their budget.


The USF Student Code of Conduct states that no student can possess, sell, or drink alcohol while representing the university, both on campus and off campus. You will be representing the USF the entire time you will be traveling and so it is expected that you refrain from drinking alcohol for the duration of your travel.



The University can only cover to the maximum listed in Title 8 of the Student Government Finance Code. There will be no exceptions to this rule.



Remember that this guide is NOT all inclusive. You may have more or less steps, depending on your specific travel plans. Make sure to plan ahead and communicate with the Office of Student Engagement early and often!



This amount is per fiscal year. Student organizations will only receive this amount per fiscal year.

CONFERENCE PRESENTATION TRAVEL GRANT GUIDE

Students have the opportunity to travel if they have been approved or selected to present at a conference. The purpose of the Conference Presentation Grant shall be to subsidize travel and expenses for students to present at conferences.

Travel can be simply driving or it can be in another state, with airfare and hotel. Since the travel process can be complicated, this cheat sheet can help you get started in your planning.

Please keep in mind that we cannot address every “what if” and so this document is not all inclusive. If you have questions or concerns regarding travel, please reach out to Christine Uphoff (cmuphoff@usf.edu).

There are different restrictions based on where the conference is located. See this guide for all the restrictions with the Conference Presentation Grant for students. This grant is reimbursement only. No pre-payment will be made.

Student must provide an official presentation acceptance email or letter from the conference at which they will be presenting to be considered for this grant.

GRANT REQUIREMENTS AND REGULATIONS

- Per Title VIII Finance Code: Students and/or student organizations that have or will receive full or partial funding for their travel expenses from another USF Department/Entity shall not be eligible for the SG Travel Funding.
- Grants are awarded during each fiscal year between July 1st - June 30th based on the Award Guidelines.
- Students traveling within the State of Florida may be awarded a Conference Presentation Grant with a maximum of \$250.00 per fiscal year
- Students traveling within the United States except in the State of Florida may be awarded a Conference Presentation Grant with a maximum of \$500.00 per fiscal year
 - No domestic traveler may be awarded more than \$500.00 per fiscal year
- Students traveling outside of the United States may be awarded up to \$750.00 per year to offset the cost of international travel, or the balance if the student has used
 - No international traveler may be awarded more than \$750 per fiscal year
- IN ADDITION:
- Students must be registered USF students both at the time they complete the application form and at the time they travel to their conferences
- Students traveling during the summer terms that are not enrolled in classes during the summer terms must have been enrolled for both the previous spring semester and the following fall semester

TRAVEL DEADLINE

Planning, submitting, and approving travel is a process that is partly done by the student, partly done by the Office of Student Engagement, and approved by USF Tampa.

Since this is a multi-step process and we want to make sure that your travel experience is the best it possibly can be.

We require ALL travel requests to be submitted NO LESS than 6 Weeks prior to the date you plan to travel.

1

Fill out the Conference Presentation Grant Form located on BullSync and submit it 6 weeks prior to the travel.

It must be signed through DocuSign and emailed with your acceptance letter to Christine Uphoff at cmuphoff@usf.edu

It can take up to 5 -7 business days to process this application.

This is where you will have to do some research to determine the various costs associated with your travel.

This form will ask for details related to your travel and it's cost.

This will help all those involved understand the importance of your proposed travel. .



The following is a list of items that you will need to know in order to fill out your Travel Request Form. This list is not all inclusive, and includes pieces that may not be applicable to you and are listed on the form.

- Conference registration costs per person.
 - Please include a link to the conference website/flyer
- Flights
 - You can use any website to research flights
- Hotel
 - You can use any website to research hotels
- Rental Car
 - Travel to and from the conference
- Mileage
 - Mileage can be calculated at 0.445 cents a miles

AFTER SUBMITTING YOUR TRAVEL REQUEST FORM

The Office of Student Engagement will reach out to the student who filled out the form and go over the procedure for travel and the reimbursement.

At the meeting, we will go over each item on the form and go over the next steps for submitting travel.

Those could include:

- The travel waiver
- What documents are needed while traveling
- What happens when you come back from travel

2

COMPLETE TRAVEL WAIVERS

After meeting with Student Engagement and having your travel approved, you will need to complete the online travel waiver.

It is the student's responsibility to fill out the travel waiver. Your travel request will not be submitted for approval without a completed waiver.

You can do this once you have received approval of you application.

3

The Travel Waiver is located on the BullSync Homepage, on the right hand side of the page.

BOOKING TRAVEL

This grant is only for reimbursement in the travel system.

The Office of Student Engagement will not pre-pay any expenses for this travel.

The Office of Student Engagement will only cover the maximum totals listed on page 2 of this document.

When purchasing the items for this trip, please remember to keep the receipts.

That is the only way we can provide a reimbursement up to the maximum amount..

4

WHILE TRAVELING

5

Collect and save all receipts for travel expenses. Our office has the right to request every receipt from your trip should it be necessary to fully process the expense report; even if the total of the receipts provided exceeds your allotted reimbursement.

All receipts **MUST** be in **YOUR** name and show the last four digits of the credit card charged.

Ensure all receipts reflect payment in full and/or a zero balance due.

Save the program as you will be required to submit the cover and the page listing your presentation with your receipts. If the conference does not have a hard copy of the program, you must locate the online program and provide the link with your receipts.

Have fun, be safe, and Go Bulls!



AFTER TRAVELING

Complete the Post Travel Summary Form (last tab of this Excel workbook). If you shared expenses, complete Section 3: Shared Expenses. If you are requesting meal allowances based on the daily state rate of up to \$36, you **MUST** submit a schedule or agenda at-a-glance from the conference

Submit the Post Travel Summary Form, ALL receipts, program cover, and page from the program listing your name and presentation to Christine Uphoff via email to cmuphoff@usf.edu within 3 business days of the return date on your application.

Once all the required documents have been received, our office will review your receipts, and we will contact you via email should we have questions or need additional documentation.

After our office has fully processed your expense report, you will be emailed a Travel Expense Report (TER) to review and DocuSign for accuracy.

It will take approximately 2 to 6 weeks to receive your reimbursement. Please be advised that the check will not come from our office and cannot be picked up. If you have direct deposit set up through employment at USF, your reimbursement will be received via direct deposit. Otherwise, it will be sent as a check to the address listed on your application.

6

FINAL REMINDERS



To receive this grant you have to be presenting at an official conference.



The USF Student Code of Conduct states that no student can possess, sell, or drink alcohol while representing the university, both on campus and off campus. You will be representing the USF the entire time you will be traveling and so it is expected that you refrain from drinking alcohol for the duration of your travel.

The University can only reimburse to the maximum listed in Title 8 of the Student Government Finance Code. There will be no exceptions to this rule.



Remember that this guide is NOT all inclusive. You may have more or less steps, depending on your specific travel plans. Make sure to plan ahead and communicate with the Office of Student Engagement early and often!



This amount is per fiscal year. Students cannot receive this amount per conference or fiscal year.

TRAVEL GUIDE FOR STUDENT ORGANIZATIONS

Student Organizations have the opportunity to travel if they have the funds available, and the travel is relevant to the club. This could be things like professional/academic conferences, leadership workshops, speakers, etc.

Travel can be simply driving or it can be in another state, with airfare and hotel. Since the travel process can be complicated, this cheat sheet can help you get started in your planning.

Please keep in mind that we cannot address every “what if” and so this document is not all inclusive. If you have questions or concerns regarding travel, please reach out to Christine Uphoff (cmuphoff@sar.usf.edu).

TRAVEL DEADLINE

Planning, submitting, and approving travel is a process that is partly done by the student organization, partly done by the Office of Student Engagement, and approved by USF Tampa.

Since this is a multi-step process and we want to make sure that your travel experience is the best it possibly can be.

We require ALL travel requests to be submitted NO LESS than 6 Weeks prior to the date you plan to travel.

TRAVEL REQUEST: SUBMISSION & APPROVAL PROCESS

1

Fill out the Travel Request Form and submit it 6 weeks prior to the travel.

This is where you will have to do some research to determine the various costs associated with your travel.

This form will ask for details related to your travel and it's cost.

This will help all those involved understand the importance of your proposed travel. It will also assist your club during the budget process if you choose to request funds for travel again in the future.

The following is a list of items that you will need to know in order to fill out your Travel Request Form. This list is not all inclusive, and includes pieces that may not be applicable to you and are listed on the form.

- Conference registration costs per person.
 - Please include a link to the conference website/flyer
- Flights
 - You can use any website to research flights
- Names and Birth dates of each person traveling, including your advisor
- Hotel
 - You can use any website to research hotels
- Parking
 - At the hotel, airport, etc.

- Rental Cars
 - The USF System uses Enterprise. You can find the rental rates on BullSync. The rental rates do not include the various fees that are charged when renting a vehicle. We suggest adding \$10 per day to your total rental cost, in order to account for these fees.
- Mileage
 - If you will be driving your own vehicle, you can be reimbursed for total miles driven. Mileage can be calculated at 0.445 cents per mile.
- Meals
 - If your organization decides to cover meals for those participating, you can figure out the total cost by using the amount pre-set by the USF system.
 - Breakfast: \$6 per person
 - Lunch: \$11 per person
 - Dinner: \$19 per person

AFTER SUBMITTING YOUR TRAVEL REQUEST FORM

The Office of Student Engagement will reach out to the club member who filled out the form and set up a meeting to discuss the travel within three business days.

2

At the meeting, we will go over each item on the form and go over the next steps for submitting travel.

Those could include:
Which purchase requests need to be submitted and how many
Who needs to fill out a Travel Waiver
If any additional information is needed before moving forward

SUBMIT A PURCHASE REQUEST

3

As soon as you have met with a member of Student Engagement about your travel and it has been approved, you will need to submit your Purchase Request via BullSync.

The Purchase Request ensures that your club is set up to pay for your travel.

Your advisor will need to approve this request, the same as any other submitted purchase request.

COMPLETE TRAVEL WAIVERS

After meeting with Student Engagement and having your travel approved, each person who will be participating in the travel will need to complete the online travel waiver.

It is the club's responsibility to make sure that each travel participant fills out this waiver. Your travel request will not be submitted for approval without a completed waiver for each participant.

You can do this at the same time you are submitting purchase requests.

The Travel Waiver is located on the BullSync Homepage, on the right hand side of the page.

4

BOOK TRAVEL WITH OSE


After all the purchase requests have been submitted and approved and everyone has submitted their travel waivers, a member of OSE will contact you to schedule a meeting to book all of your travel.

**YOU DO NOT BOOK THE TRAVEL
YOURSELF!**

At this meeting, everything that will be purchased using the club funds will be booked. The club member will receive copies of everything booked during the meeting.

5


FINAL REMINDERS



The policies of the Office of Student Engagement require that your advisor (or their designee) travel with your club if you will be traveling outside of the state of Florida or if your request is deemed "High Risk" by the OSE (ex. Scuba Diving, Rock Climbing, etc.). The club is responsible for paying for all advisor expenses, including (if applicable) a hotel room specifically for your advisor.

The USF Student Code of Conduct states that no student organization and their members can possess, sell, or drink alcohol while representing the university, both on campus and off campus. Your club will be representing the USF System the entire time you will be traveling and so it is expected that your organization refrains from drinking alcohol for the duration of your travel.

Remember that this guide is NOT all inclusive. You may have more or less steps, depending on your specific travel plans. Make sure to plan ahead and communicate with the Office of Student Engagement early and often!



Your organization can cover as much or as little travel for each individual participant (other than the advisor) that you agree on. Your organization can travel as a group and ask that participants pay for various things out of pocket. This is at your organization's discretion.





7 POLICIES EVERY STUDENT ORG NEEDS TO KNOW

Use this guide to learn about the 7 policies that every student organization is expected to know and follow.

Still have questions? Contact the Coordinator of Student Organizations & Leadership in the Office of Student Engagement!



ALCOHOL POLICY

The University of South Florida Sarasota-Manatee prohibits the student organizations from possessing, selling, transporting, or consuming alcoholic beverages at University sponsored events, both on and off campus.

DISTRIBUTION OF LITERATURE

The University prohibits the posting, distributing, stacking or placement in racks of any commercial material. Additionally, no material of any kind may be placed on automobile windshields. Other non-commercial material or literature may be handed out in any outdoor University location open to the general public. Other non-commercial speech activities are permitted in outdoor University locations open to the general public exclusive of sidewalks, building entrances or other areas where normal traffic may be obstructed.

Student organizations have a responsibility to distribute materials in a responsible way so that it does not litter the campus. RSO's cannot post flyers and materials on trees, sidewalks, or other non-approved posting areas. RSO's will be responsible for conducting clean-up for any materials that do litter campus and the associated costs.

DVD/VIDEO COPYRIGHT

Federal copyright law restricts the use of videocassettes and DVDs for private showings and prohibits their public performance without prior written consent of the holder of the copyright. A public performance includes, but is not limited to, showing a motion picture in a location open to the public, showing a motion picture to a selected group of people gathered in a location not open to the public (i.e. residence hall floor or lounge), or showing a motion picture by broadcast or transmission. Student organizations choosing to publicly show a motion picture in any form (film, VHS video, DVD, etc.) must secure a license from a booking agency. For a list of booking agencies, please see the Office of Student Engagement.

UNIVERSITY LOGOS & TRADEMARKS

USF has registered its names, initials, logos, and trademarks as a means of protecting them from unauthorized use and abuse. Permission is required before they may be reproduced. The use of the University's marks on a website or T-shirt is also protected by federal trademark laws. Any student organization wishing to use the USF or USF Sarasota-Manatee logo or mark must have prior approval.

NON-DISCRIMINATION

The University of South Florida reaffirms its policy of equal opportunity regardless of race, color, creed, religion, national origin, sex, age, marital status, disability, or status as a disabled veteran or Vietnam era veteran. This policy applies to all programs and facilities including, but not limited to, admissions, educational programs, employment, and patient and hospital services. Any discriminatory action can be a cause for disciplinary action. Discrimination is prohibited by Executive Order 11246 as amended, Title VI and VII of the Civil Rights Act of 1964, Title IX, Sections 503 and 504 of the Rehabilitation Act of 1973, Americans with Disabilities Act of 1990, Vietnam Era Veterans Readjustment Assistance Act of 1972 as amended, other federal and state statutes, regulations, and University policy. Additionally, USF does not discriminate based on sexual orientation.

FUNDRAISING

Each student organization may engage in fundraising activities, the proceeds of which may be devoted to the activities and projects of the organization itself, subject to the following rules and regulations:

- A&S Fees should not be used to cover direct costs of the fundraiser.
- Any fundraiser where a single donation of \$1,000 or more is donated must be reported to the Office of Student Engagement.
- If a student organization raises funds for a philanthropy or non-profit organization, the student organization must publicize the name of the philanthropy or non-profit and the portion of the proceeds that will be donated.
- An organization's privilege of engaging in fundraising activities is subject to immediate cancellation if the methods used are disorderly, improper, or if they hinder or otherwise interfere with any individual's rights to privacy and freedom from harassment.

Funds which are generated by student organizations, not using A&S fees, can be placed in off-campus accounts. RSO's are strongly encouraged to use the USF Credit Union. You can find the steps to open an account at the USF Credit Union on BullSync.

Be aware that your organization is using the USF and USFSM name and funds should be managed appropriately. Monies generated must be in compliance with all federal, state, and local laws, USF, and A&S policies, regulations, and guidelines.

HAZING

The University of South Florida prohibits any form of hazing of its students, at any time, or at any location. The University will respond swiftly to investigate reports of alleged hazing received from any source, and will promptly determine whether to proceed with campus disciplinary action, to forward a report to appropriate law enforcement officials for prosecution as a criminal matter, or both. To that end, hazing is a violation of the Student Code of Conduct and illegal as defined in the Florida State Statute 1006.63.

A faculty member, staff member or student who observes hazing of any person or persons who may be USF students should immediately report the matter to the Director of Student Engagement (941) 359-4268, or to the Campus Police (941) 487-4210.

Students who know, or suspect, that hazing has taken place are strongly encouraged to report it to the Dean for Students. Employees of USF are required to report such information.

In addition to Florida Statutes §1006.63, hazing as defined by the USF system also includes, but is not limited to, the forced use of alcohol; morally degrading or humiliating games and activities; physical and psychological shocks; deception; verbal abuse; personal servitude; kidnapping; deprivation of privileges granted to others in the organization by use of force or duress; and any other activities which are contrary to academic achievement, the stated purpose of the local and/or (inter)national organization, and/or the mission, policies or regulations of the USF system or applicable state law.

FUNDRAISING
&
OTHER
FORMS
OF REVENUE



FUNDRAISING

Each student organization may engage in fundraising activities, the proceeds of which may be devoted to the activities and projects of the organization itself in furtherance of its goals and objectives, subject to the following rules and regulations:

1. The organization will be responsible for all direct costs, if any, involved in the use of the facilities. **NO A&S FEES CAN BE USED FOR FUNDRAISING.**
2. The university understands the importance of fundraising activities, but cannot absorb costs associated with executing the event. The event planner is responsible for associated costs incurred.
3. Any fundraiser where a single donation of \$1,000 or more is donated must be reported to the Office of Student Engagement.
4. If a student organization raises funds for a philanthropy or non-profit organization, the student organization must publicize the name of the philanthropy or non-profit and the portion of the proceeds that will be donated.
5. An organization's privilege of engaging in fundraising activities is subject to immediate cancellation if the methods used are disorderly, improper, or if they hinder or otherwise interfere with any individual's rights to privacy and freedom from harassment.

RAFFLES

A “raffle” means a game in which the prize (monetary or merchandise) is won by random drawing of the name or number of a person who has **PURCHASED** chances. Raffles are limited to two (2) per year.

Section 849.0935 Florida Statutes states that only organizations exempt from Federal income taxation (tax exempt 501(c)(3) organizations) may conduct raffles. In order to conduct a raffle, it must be done under a 501(c)(3) corporation. If you are not a 501(c)(3) organization, you may not conduct a raffle under Florida law.

Student Organizations at USFSM do **NOT** have 501(c)(3) status!

If you would like information on how to hold a raffle that adheres to all Federal and State Laws, please contact the Coordinator of Fiscal Operations!

GAMES OF CHANCE

Section 849.0935, Florida Statutes, authorizes qualified nonprofit corporations and their officers, employees and agents to conduct drawings by chance, provided certain conditions are met.

Student Organizations are considered an "agent" of USFSM and qualify to hold Games of Chance as long as they adhere to all state and federal policies.

All brochures, advertisements, notices, tickets, or entry blanks used for such drawings must conspicuously disclose:

1. The rules governing the conduct and operation of the drawing.
2. The full name of the organization and its principal place of business.
3. The source of the funds used to award cash prizes or to purchase prizes.
4. The date, hour, and place where the winner will be chosen and the prizes will be awarded, unless the brochures, advertisements, notices, tickets, or entry blanks are not offered to the public more than 3 days prior to the drawing.
5. That no purchase or contribution is necessary

It is unlawful for any organization that is authorized to conduct a drawing by chance to require an entry fee, donation, substantial consideration, payment, proof of purchase, or contribution as a condition of either entering the drawing or being selected to win a prize.

Therefore, the organization distributing the raffle tickets may not require a contribution or donation in order to participate in the raffle; nor may it arbitrarily disqualify or reject any entry or discriminate in any manner between entrants who contribute to the organization and those who do not.

It is also unlawful to fail to notify the person whose entry is selected to win that they have won, or to fail to award the prizes in the manner and at the time stated.

MEMBERSHIP DUES

Student organizations wishing to charge membership dues are not permitted to apply for A&S fees. All other student organizations may charge membership dues and those dues should be deposited in their off-campus checking accounts and be monitored with appropriate financial procedures..

DONATIONS

Fundraising by soliciting donations, whether cash or merchandise, is a powerful way to raise large amounts of money for important programs or events. Different ways to solicit donations are (a) person-to-person requests, (b) phone calls, and (c) mail solicitation.

All of these provide great opportunities to educate others about the importance of your program and gain financial support. Remember that providing detailed information is important. Be prepared to answer questions about your program, including how the money will be used and who else is participating.

Many businesses wishing to make donations ask for a tax-exempt number. Most student organizations are not tax exempt unless your organization has specifically applied for tax exemption from the IRS. Student Organizations cannot use USF tax exemption number for the purposes of obtaining donations.

CROWD SOURCING/FUNDING

A student organization might want to create accounts and raise money through various websites for a project or for general fundraising.

(Examples of websites include: Gofundme, Indiegogo, Crowdrise, etc.) For student organizations wishing to use these sites for fundraising must follow these guidelines:

1. The USF & USFSM logo may not be used anywhere on the page
2. The university name may not be used in the creating of the page
3. The organization must have their own FEIN and Off-Campus checking account