

Student Business Services (SBS) Checklist

EVENT Purchase Requests

**** Failure to comply may result in additional training and/or removal as a Financial Officer****

Planning Stage

- A&S funded events must be open to all USF Students, free to attend, and without fundraising, raffles nor alcohol
- A&S funds may not be used to purchase foods for your Registered Student Organization's General Body Meeting or elections
- All funded events must be **created in BullsConnect**, and the link **must be included on the purchase request form**
- Requests must be for your Registered Student Organization's needs and not to benefit other RSOs, departments, or entities
- The supplies/materials being requested for your event must be fully described on your purchase request form and must be related to your event
- For events taking place in the Marshall Student Center, there may be fees associated for room rental and technical support. **You must submit a request to pay EMS/ MSC Event Services prior to your event like any other supplier**

SG Statutes Limits

- Foods and drinks at an event to \$10.00 per expected USF students in attendance. You may estimate if you are unsure; however, please DO NOT increase this number in order to spend more money. All events are subject to an audit by Student Government
- As of Fiscal Year 2023-2024, SG Statutes limit expenditures on Capital Asset, Publications, and Speakers. **YOU MAY NOT SPEND MORE THAN ALLOCATED, AND AS IMPORTANTLY, IF YOUR RSO WAS NOT FUNDED FOR SUCH, YOU MAY NOT REQUEST TO SPEND THE BUDGET ON THEM**
- You may use almost any supplier that will accept our methods of payment: credit card over the phone, purchase order/check within 30 days after the event, USF departmental transfer for supplier such as (MSC Event & Meeting Services, Rec & Wellness, and USF IT Visualization), and credit card online or over the phone
- Here are a few suppliers we cannot work with as they do not accept our payment terms: **WINN-DIXIE, TARGET, BJ'S, COSTCO, SAM'S CLUB, WALMART, LITTLE CAESAR'S, ESTRELA BRASIL, PIZZA HUT, DOMINO'S CHIPOTLE, PARTY CITY, HUNGRY HOWIE'S, WING STOP, AL MADINA, JOLLIBEE, LA FAMILIA BAKERY, MARCO'S PIZZA, PANDA EXPRESS(OFF-CAMPUS)**

Office Depot

- must be used for any office related supplies; you will need to visit their website to obtain the item number(s) for your Purchase Request Form
- Do not submit requests to purchase items you can borrow or rent for a nominal charge (like tents, tables, coolers, etc...)
- You may not use A&S funds to purchase gifts, gift cards, greeting cards, books including testing manuals/books for (GMA, GRE, LSAT, DAT, MCAT etc...) personal items such as stoles and ribbons etc..., raffle prizes nor items that violate SG & SBS policies
- **CONTRACTORS/Speakers & Honoraria**
- Never sign a contract which is associated with an A&S Request. Submit the contract & quote with a purchase request form to SBS so it may be reviewed by the appropriate University Office
- **An Honorarium, which is a gift, must not have been negotiated with the speaker or performer; otherwise, you will be held in violation of USF Policies if you submit one incorrectly. We may deny the request, or we may require a refund**

Promotional Materials

- USF has a list of Approved Promotional Suppliers; you must call and request your quotes(s) from one or all of them. We highly recommend that you contact more than one supplier at <https://www.usf.edu/business-finance/purchasing/staff-procedures/purchasing/pur-marketing-promo.aspx>
- SG Statutes limit promotional items up to \$10.00 per item (**up to \$12 for shirts XXL and larger**) which includes all set up charges and do not include shipping and credit card fees; also, all promo items may not exceed \$1,400.00 per fiscal year
- If your event is off-campus, prior approval from Student Government is required. Please plan early as this approval takes time. The request form can be found on the SG BullsConnect page
- Purchase Request Submission and other Purchasing related deadlines are set by SBS in accordance with some USF Purchasing and Controller Office Policies and SG Statutes

Storage

- Non-consumable Items purchased remain the property of USF SG; items that cost \$100.01 or more **each** must be stored on the USF Tampa Campus, and may be characterized as a check-in/check-out item by SBS to allow all A&S Funded RSOs to use the items
- Items that cost \$100.00 or less **each** may be stored off-campus; however, you must provide a complete address on your Purchase Request Form

Submitting a Request

- Requests for local food suppliers and USF Departments must be submitted for review **at least TWO WEEKS** prior to the event or much earlier to sg-rmdpurch@usf.edu
- You must submit a separate email for each request; however, it is fine to submit multiple forms for one supplier if they are for the **same** event
- When requesting to use suppliers who are individuals and businesses that are not incorporated, we require requests **at least THREE WEEKS** prior to the event; for examples Independent Contractors and Honoraria (**We will not pay individuals with a credit card**)
- Refer to the Step-by-Step Instructions for Purchase Request to guide you through submitting the request; they can be found on the SG BullsConnect Page
- Watch your official USF email for questions about your request or an approval notice. It will contain specific instructions about placing a tax-exempt order and then notifying SBS that the order has been placed. **Make sure to read the entire message!**
- Only place the order with the supplier after you have received written approval. Do not change the order after it is approved
- Remember to track USF student attendance at your A&S events
- **Requests may not be approved after-the-fact and you will NOT be reimbursed for out-of-pocket expenses**

Completing the Process

- PDF attachments of itemized receipts/invoices (**not quotes**) must be turned in to SBS no later than **the next day**. Receipts must be itemized; for some suppliers this is one slip of paper; for other suppliers there are two pieces of paper ex: Papa John's = 2 receipts. It is your responsibility to ensure that receipts are picked up and are not discarded
- Please include the name of the organization, the date of the event, financial officer's name, and TIP (if any) on all receipts and invoices before they are provided to us
- Your **PDF** Receipts and invoices attachments must be emailed to SG-RMDORGHELP@USF.EDU or turned in to Student Business Services M-F from 9:00 AM to 4:00 PM. **Email is the preferred method**
- You may add no more than a **15%** TIP on your food purchases: **if your budget can support it**; write the tip amount on the receipt
- You are advised to keep copies of all receipts for your RSO's records
- Your receipts will be audited; SBS may ask for you and/or your Executive Board to reimburse for purchases that violate SG Statutes, USF Policies, and SBS Procedures/Policies and for purchases which were not approved
- Items purchased with A&S Fees must be shipped to Student Business Services (SBS). You must pick up the items from SBS within **2 business days** after we have notified you via email, or no later than 72 hours if we notified you on a Friday. **STUDENT BUSINESS SERVICES(SBS) IS NOT A STORAGE LOCATION**
- RSOs which are located at the Downtown Campus or on the St. Pete Campus may be given the option to have SBS forward their purchases/packages to their respective campus via USF Inter-Office Mail