CREATING
A FINANCE REQUEST IN PIONEER LIFE

WILLIAM PATERSON UNIVERSITY

1 I have an Idea for a Program or Event

- Topic – Should be associated with your club's mission
- Title – Think of something catchy and memorable
- Location for the event – Make sure you can fit all the participants you expect – *See step two*
- Dates (All events need to have **final approval** no later than **2 weeks out from the event date**. If you need money, please read the financial guidelines to set the date of the event, and please complete a financial request as well.)
- Activity, speaker, fun event. (think about what is going to get people to show-up, keep people at your event and allow them to learn something)
- Think about co-sponsorship opportunities with other SGA clubs, this may allow you to access additional funds

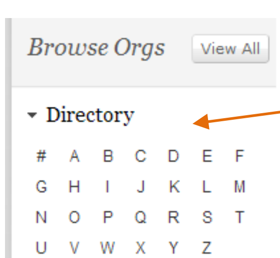
2 Reserve a Room

- Think about number of students who will attend, room set-up and AV needs, Officer Coverage, facilities charges and other specifics with your event.
- Send request to room reservations (http://www.wpunj.edu/eventspace/university-commons/room-reservation-form.dot)
- Wait for a confirmation of the room. This is only completed once the office of Campus Activities signs off on the event. Be sure to confirm the room prior to processing any paperwork or money for the event. Room reservations should be secured at least three weeks out from the date of the event. Quick note, make sure you cancel the room reservation if the event is cancelled or moved to a different date.

3 Create an Event Form on Your Club's Pioneer Life Page

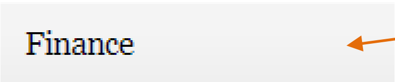
Please see the step by step outline for creating and completing an event form. All Financial requests MUST have an event form completed as well in order to be processed.

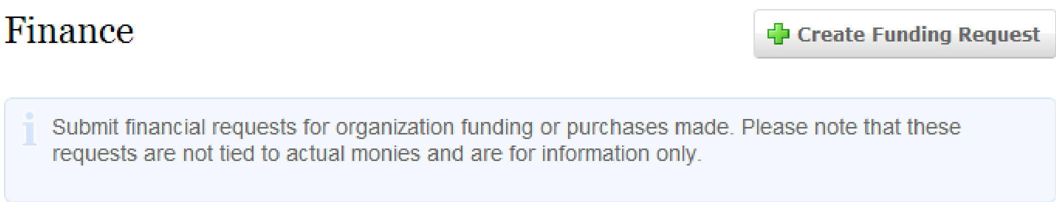
4 Create a Financial request on Your Club's Pioneer Life Page

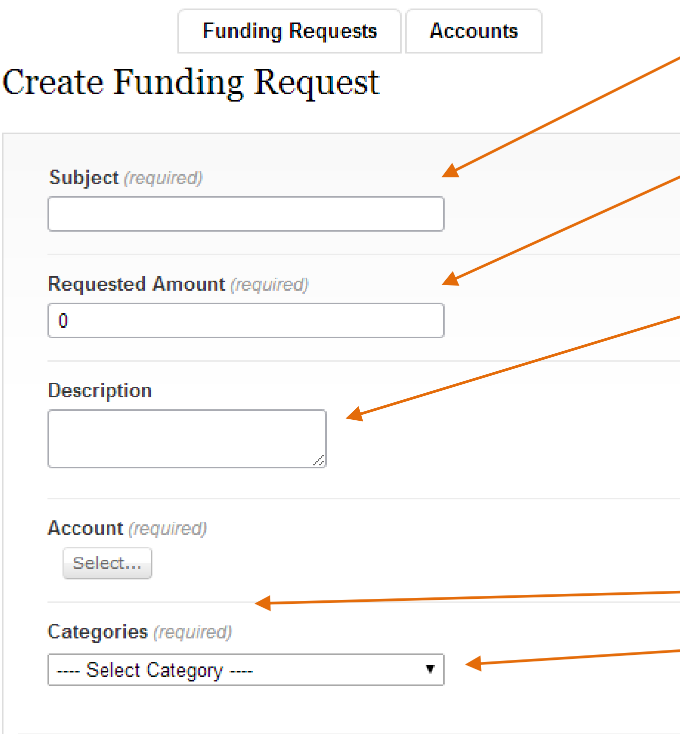


Find your organizations page in Pioneer Life. Please note, only those individuals who have completed Leadership Academy training will be permitted to enter a financial request. If you need access, please contact the Office of Campus Activities and Student Leadership at 973-720-2271 or at campusactivities@wpunj.edu for assistance.

Once you find your clubs' home page, click on the "Finance" tab and then click "Create a Funding Request"







Subject – Refers to the title of the event. Please sue the exact same title as the one chosen for the event form.

Request Amount – This is the total cost of all financial obligations for the event. This should include only the prices listed on the quotes you are actually using.

Description – Since this is filled out in the event form, please just indicate that this form is to supplement the event form and that additional information about the event may be found on that form.

Account – Student groups will have a variety of accounts to choose from. In most cases students should select the club account. If the club has OP funds, they should indicate that here in this section.

Categories – This is either an expense or income.

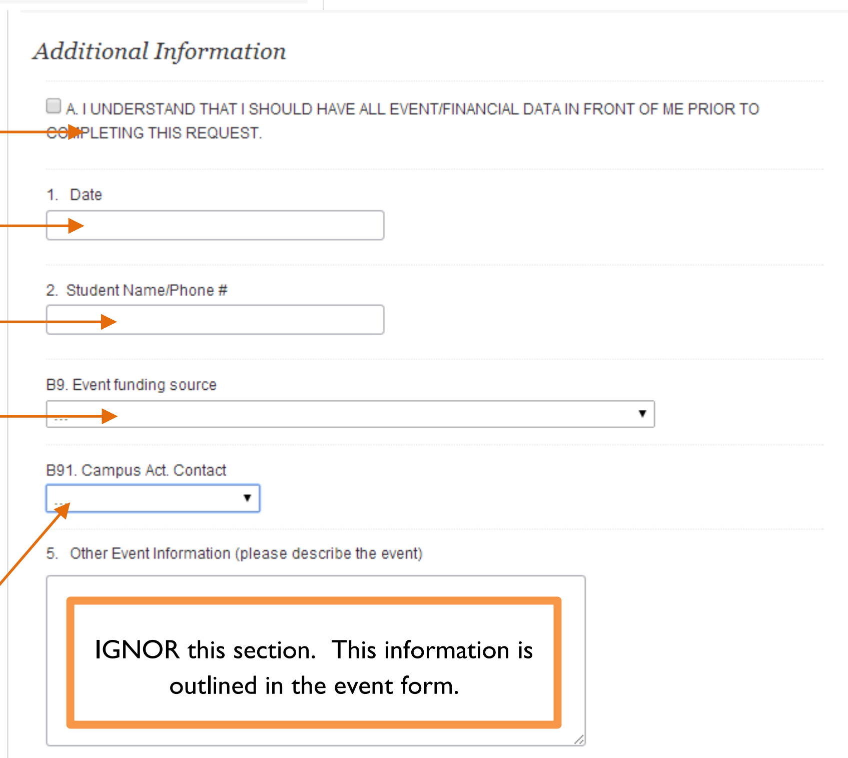
Please check the box at the top of the page in order to start the process.

Date – Please put the date of the event

Student Name and Phone – Please put the name of the student most responsible for the details of the event. Please include the student's cell phone number in this section.

Event Funding Source – Please indicate where you are attempting to secure the funds. In most cases it is the SGA club account. Greeks will use Greek Orgs section.

Campus Activities Contact – Please select the staff member you plan to work with in order to process your event.



IGNOR this section. This information is outlined in the event form.

Using Vendors listed in the drop down box:

Students creating a financial request must provide as much information as possible about the vendor and the items needed. Each vendor will need to be listed in the sections provided on the finance form. Each request only has room for up to 6 vendors and 3 pre-contracts. Please see below to determine the best way to complete this form.

M36. Club/Event

M37. Date Required

M40. Vendor Information

M41. Amount Requested

M42. Request Description (be specific, What are you

M43. Payment Method

Y2. Upload Back-Up for this Vendor here

Upload File

M45. Purchase Order #

Club / Event – Please enter your club name and the name of the event. Be sure to use the same event name as you listed on the event form.

Date Required – Please list the date in which you need to secure the funds for the event.

Vendor Information – SGA has a list of regularly used vendors. If the vendor you are using is listed in the drop down menu you may complete sections M40 – M44. If not, please skip to M60

Amount Requested – Please list the amount needed for each vendor. This is the total amount listed on the invoice you received from the vendor. Please keep in mind that WPU is tax exempt and thus tax should not be included in a quote. Further, if you are using a vendor that requires gratuity, please have them add that to the invoice so we can process the full amount. SGA prohibits student groups from passing additional funds once any portion of the SGA budget has been allotted for the event.

Request Description – Please detail why you are asking for the funds and what services are we receiving.

Payment Method – Student groups may choose between a check or credit card payment option. Checks are made out to the vendors and are in most cases mailed to the vendor after the service has been provided. If the vendor requests payment the day of, student should ask SGA to pick up the check the day of the event. If the student group selects to use a credit card, they must use the card for on-line purchases or they may pick up the card at the Office of Campus Activities to bring to a local store. See Credit card policy for more information.

Upload File – Please upload the actual invoice in this section. If you are not able to upload the invoice, please bring a hard copy with you when you meet with a CASL staff member for stage three approvals.

Purchase Order # - the SGA financial advisor will assign each vendor a separate PO#. Students will need to know this number when using a credit card. The SGA Financial Advisor is the only member of the WPU community that may assign a PO #.

Using Vendors NOT listed in the drop down box:

Students creating a financial request must provide as much information as possible about the vendor and the items needed. Each vendor will need to be listed in the sections provided on the finance form. Each request only has room for up to 6 vendors and 3 pre-contracts. Please see below to determine the best way to complete this form.

Club\Event

Date Required

M60. Vendor Information

M61. Amount Requested

Request Description (be specific, What are you paying for)

M63. Payment Method

Y2. Upload Back-Up for this Vendor here

Upload File

M65. Purchase Order#

Vendor Information – M60, M70, and M80 of the finance form have been created to allow students to use vendors that are not available in the drop down box. In these cases, students must include the vendors name or company name, the vendors address (to send check to) and the vendors contact information.

Request Description – Please detail why you are asking for the funds and what services are we receiving.

Payment Method – Student groups may choose between a check or credit card payment option. Checks are made out to the vendors and are in most cases mailed to the vendor after the service has been provided. If the vendor requests payment the day of, student should ask SGA to pick up the check the day of the event. If the student group selects to use a credit card, they must use the card for on-line purchases or they may pick up the card at the Office of Campus Activities to bring to a local store. See Credit card policy for more information.

Upload File – Please upload the actual invoice in this section. If you are not able to upload the invoice, please bring a hard copy with you when you meet with a CASL staff member for stage three approvals.

Pre-contract Information – Any vendor that is providing a service (performing, novelties, or lecture) must have a pre-contract generated in order to be approved to move forward with the event. In order to draft a contract, SGA will need the information completed below. A pre-contract must be completed for each vendor providing a service. Campus offices do not need a pre-contract completed.

T2. Performer's Name

T21. Performer's Email

T3. Description of Service (please be a specific as possible,

T4. Performance Start Time

T5. Performance End Time

T6. Check Payable To:

T7. Agency/Contact Person

T8. Agency Phone Number

T81. Lodging Required

T9. Additonal/Technical Requirements

Performers Name – Please list the performer's actual name. Do not list any stage names. If this is for a company, please list the company name here.

Performers e-mail – Please list the performers e-mail address here.

Description of Service – Please outline, in detail, the expected service form the performer. What exactly are they doing at the event you are organizing?

Performance Start Time – this is the actual time the performer is expected to participate in the event. Please do not just list the start time of the event, as this is a contract and we must hold each performer to their specific start time.

Performance End Time – this is the time in which the performer

Check Payable to – In this section, please identify who the check should be made out to. In other words, is the check to the company, the actual performer, the agent etc.

Agency / Contact Person – In this section, the student should identify the person in charge of the performer. In some cases this is an agency, a manager, or an agent. In most cases, the student will list the performer themselves.

Agency Phone Number – please list the cell phone number of the performer or agency

Lodging Required – As the performer if they need to stay in a hotel in order to perform on our campus. If they do, this information must be listed on the SGA contract that is generated for the performer to sign.

Additional Tech Requirements – in many cases, the performer may have a list of specific tech needs for their show. Please be sure to list all items needed for the performance. If the list is long, please just ask for a rider from the performer and bring that to CASL when you come to get a stage three approval.

5

Meet with a Campus Activities Staff Member for Financial Approval

After a student group submits a financial request, a member of that group must meet with a Campus Activities Staff member for approval. During the meeting, the CASL staff member will review all information about the event, review all letters and waiver forms associated with the event, and will review any financial requests that will accompany the event request form. Please be sure to bring all supporting documents to this meeting including all invoices and back up quotes.

Please Keep in Mind the Following:

- CASL is not notified electronically when a new event/financial submission has been made. It is the student group's responsibility to follow-up with a CASL staff member no later than **two weeks prior** to the date of the event or by the deadline outlined in the financial timeline for final approval.
- Students are encouraged to call 973-720-2271 to set-up an appointment with a staff member ahead of the event review process.
- Student groups are responsible for any additional costs associated with the event not covered by SGA.
- Events must take place as approved and may not be altered after CASL reviews the request.

After Your Event is approved:

- Begin advertising for event once Event Request and/or Funding Request has been approved by Campus Activities Staff Member
- Contact all vendors to confirm event details
- Speak with organization members to work out all logistics for the day of the event and who will be responsible for each aspect of the event

On the Day of the Event:

Arrive early to meet all vendors for setup and to confirm that the room setup and media needs are taken care of before your attendees begin to arrive

After the Event:

- CLEAN UP THE ROOM!
- Evaluate the event in Pioneer Life
- Thank your clubs members and other volunteers for assisting in the event
- Thank vendors for their efforts during your event

Five stages of approval:

Stage One: Approved Financial Officer or Primary Contact
Stage Two: Club Campus Advisor
Stage Three: Any Campus Activities Administrator
Stage Four: SGA Treasurer
Stage Five: SGA Financial Advisor

Credit Cards
SGA clubs and organizations have access to two (2) credit cards. The following policy relates to usage of credit cards:

- Usage of the card must be authorized by a purchase order number only, issued upon approval of the financial request. The purchase order number must be presented to the Office of Campus Activities representative when requesting a credit card.
- Usage of the credit card is limited to the respective President and Treasurer of the requesting club or organization. This privilege is also extended to the executive officers of the SGA and respective chairpersons of SAPB and Greek Senate.
- In the event the credit card is lost or stolen after SGA operating hours, immediately contact the credit card company or SGA Financial Manager.
- Amount of purchase should not exceed amount approved by the SGA purchase order.
- In the event that an amount charged excessively exceeds what was authorized by the Finance Committee and/or SGA Treasurer, funds for the club or organization will be frozen until the money has been paid back into the respective account.
- Credit card must be picked up and returned the same day. Proper planning and time management is recommended when requesting the credit card.
- Since signer is responsible for the card during the time signed out, it should never be transferred to anyone else. Card must be picked up, used, and returned by the President or Treasurer.
- Receipts for purchases/credits must be submitted at the same time the card is returned to the Office of Campus Activities with purchase order number on the receipt. Any change in vendors should be noted on the receipt at this time.
- Receipts must be clearly marked if merchandise/services are not to be charged to the same line item and/or more than one purchase order number.
- The individual in charge of the budget line must initiate use of the credit card for a purchase against the respective SGA budget line.

Quote Information-Consistent with the philosophy of obtaining the best value for general services or items (excluding performers) clubs should include three (3) vendor quotes for general items or services over $600. Paper quotes are required to be submitted as backup documentation for a financial request for general items or services.

If it is deemed necessary to accept other than the lowest price for a general service or item, the reason must be documented. SGA members who purchase goods/services with vendors who are family members, university employees or fellow students must disclose that information.