



RSO MINI FINANCE HANDBOOK

Funding for Registered Student Organizations | 2026-2027

University of Memphis, Student Government Association / Student Engagement

START HERE

This handbook covers everything an RSO officer or faculty advisor needs to know about getting funding, spending it correctly, and getting reimbursed. It is the front door. The detailed procedures live in the two process maps, and this document tells you which one you need.

Where this handbook and a process map differ, the process map governs. The maps are the governing documents; this is the orientation.

The one thing to know

Train early and submit early. Funding is awarded first come, first served against a fixed annual allocation. Meeting a deadline does not guarantee funds are still available. An organization that waits until the last allowable day may find the allocation exhausted no matter how far ahead of its own event it submitted.

WHICH PROCESS DO I NEED?

If you are...	Use	Who decides
Holding an event, printing, buying signage or supplies, paying a speaker	SOF Programming Request	SGA Finance Committee
Reporting what you actually spent after your event	SOF Purchase / Funding Request	Compliance review, not a new decision
Traveling to a conference, academic presentation, or leadership program	SGA Travel Funding	Secretary of Finance
Booking a space in the UC, Rose Theatre, Student Plaza, or Alumni Mall Lawn	CES Partnership , no application	Not a funding request
A graduate student traveling	Graduate School process , not SGA	GSA

- **Programming and travel are separate.** Different money, different caps, different submitters, different deciders. A travel request is never submitted from an organization page, and a programming request is never submitted from a personal profile.
- **CES is not funding.** Covered partnership charges are paid from partnership funds. What you receive from CES is a confirmation, not a bill. Do not submit it for reimbursement.

THE TWO TRACKS, SIDE BY SIDE

	SOF PROGRAMMING	SGA TRAVEL
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Who submits	An RSO officer with TigerZone access, from the organization page	The individual traveler, from their own profile
Where	Organization Tools, then Finance, then CREATE REQUEST, then Create Budget Request	Your initials, upper right, then My Submissions, then Budgeting
Cap	\$5,000 per initiative. \$5,000 to \$7,500 only for an official collaboration between two or more RSOs. No aggregate semester or annual cap	\$600 per traveler, per semester. Two applications per academic year, one per semester
Advance notice	14 calendar days, Tier One. 30 calendar days, Tier Two	15 business days domestic. 8 weeks international
Hearing	Required for Tier Two. Optional for Tier One on request	Required for international. Optional for domestic on request
Who decides	SGA Finance Committee	Secretary of Finance
Reimbursement basis	Actual cost with an itemized receipt. Direct vendor payment requires an itemized invoice. Tips up to 20 percent	Lodging and meals at the per diem rate for the destination regardless of actual cost. First and last travel day at 75 percent of the daily meal rate
Required documentation	Itemized budget for any request over \$1,000. Event advertisement or meeting agenda at reconciliation. Food and Meal Justification Form for any food purchase	Conference confirmation on EVERY application. CIPS registration confirmation if traveling internationally
After the event	Documentation within 14 calendar days of the event date	Documentation within 14 calendar days of return

BEFORE YOU CAN BE PAID: ORACLE SUPPLIER REGISTRATION

New as of September 30, 2026. Applies to every student reimbursement, programming and travel alike.

Any student who will be reimbursed must first register as a supplier in Oracle. Without it, you cannot be paid, however complete your documentation is.

- Register at memphis.edu/procurement/oracle/vendor.php, then select **New Supplier Registration**.
- **Use a non-University email address.** Not your UofM address. This is the step people get wrong. A University address locks out students employed by the University and stops working when a contract ends or you graduate, which is why the rule changed.
- Enter your **UID number** where it asks for a Social Security number. No W-9 is required.
- Approved within **48 hours** excluding weekends and holidays, usually the same day. Register when your funding is approved rather than after you spend.

You do not submit your own reimbursement in Oracle. You register as a supplier, then submit your documentation through TigerZone as usual. Student Engagement enters the requisition. Registration is the only part that is yours.

BEFORE YOU CAN ASK FOR ANYTHING

- **Your organization must be registered and active** for the current academic year.
- **An officer must complete SGA financial training.** This is delivered inside the SLI RSO training session, so attending that session satisfies both. SLI training alone does not; they are delivered together, not interchangeably.

- **Travel has its own training.** Each individual traveler completes the SGA Travel training and quiz. Attending officer training does not cover it.
- **Law school RSOs:** Law School registration does not substitute for SGA financial training.

An advisor may not submit a funding or reimbursement request. A request submitted by a faculty or staff advisor is an automatic denial and cannot be fixed after the fact. Advisors approve event details in TigerZone; that is a separate review and it is not a funding submission.

SHARED DEFINITIONS

Terms used across both tracks. Several are routinely confused.

Term	What it means
SAF , Student Activity Fee	A required fee paid by all enrolled students, assessed by matriculation level and hours enrolled. Established under SA8000. These are State funds and carry the rules that go with that
SAFA	Student Activity Fee Allocation. The overall budget the fee funds, not a separate application category
SAFAC	Student Activity Fee Allocation Committee. A University standing committee that allocates the fee annually. Distinct from the SGA Finance Committee
SOF , Student Organization Fund	The programming funding available to RSOs, drawn from SAFA
Initiative	A single event or project. The cap applies per initiative, not per organization per year. Multiple initiatives are allowed
Tier	The band a programming request falls in. It sets the advance deadline and whether a hearing is required. It is not a measure of event size
Reconciliation	Reporting what you actually spent after your event, with receipts. A second request, not a second decision
Allocation	The posting of an approved award to an organization's finance account. Performed at compliance clearance, not at approval
Per diem	A fixed daily rate for lodging and meals set by destination, published at gsa.gov . Applies to travel, not to programming
CES Partnership	An arrangement under which Conference and Event Services covers certain event charges directly. No application, and not part of a funding request
Exception	A request for relief from a deadline for documented reasons. It cannot fix eligibility, advisor submission, missing training, or an exhausted allocation
Appeal	A challenge to a pre-event or pre-travel funding decision, submitted to the Speaker of the Senate and decided by the General Assembly. A denial based on a University policy violation cannot be appealed. Reimbursement denials are final

Retired terminology, do not use: Student Event Allocation (SEA), Operational Assistance, and Solicitation of Funds as a funding term.

WHAT CANNOT BE FUNDED

Applies to both tracks unless noted.

The event or activity

- Anything connected to an academic program or the operation of an academic program.
- Events not open to and advertised for all University of Memphis students.
- Guest lectures or in-residencies restricted to a limited audience.
- Salaries or stipends for students receiving academic credit for participation.
- Events hosted on behalf of an academic department, or where a department or program uses an RSO as a front for its own programming.

- Events where the majority of participants are not UofM students.

The costs

- **Fundraising, including philanthropy.** You may hold a fundraiser and the event itself may be funded. One test applies: did SAFA pay for an item that is then sold? If yes, that item is not fundable. Decorating cookies at an event is allowable; selling them is not. Giving away wristbands is allowable; selling them is not. **A request is not ineligible because the event includes a fundraiser.**
- **Where the proceeds go does not change the answer.** Philanthropy is not a separate category. A charity 5K with SAFA covering event costs is fundable; a bake sale for a charity is not fundable as to the ingredients, for the same reason a bake sale for your own organization is not. Funds raised must be reported in post-event documentation either way.
- **Awards, gifts, and honorariums.** Not allowable. The University issues a Form 1099 once cumulative gifts to one person reach \$600 across all University sources, and that total is not tracked.
- **Prizes,** meaning anything monetary. Generally not allowable. Gift cards require advance Accounts Payable approval and are not a standing option.
- **Flowers.** Not allowable.
- **Trophies and plaques** are a separate category and ARE allowable where each individual item costs under \$600. That is a per-item figure, not the cumulative 1099 threshold above.
- **Giveaways,** meaning items such as t-shirts, polos, hats, fans, portable chargers, pens, pins, or tiger tails, are allowable **up to \$25 per unit** at purchase. Exceptions above that require approval of the Vice President for Student Affairs or designee, routed through the AVP for Student Engagement.
- **Software and subscriptions.** Not fundable. Student technology is funded by the Technology Access Fund, a separate fee, and BF4003 prohibits paying an individual's subscription from State funds. If you need design tools, **umApps already gives you Adobe Illustrator, InDesign, and Photoshop at no cost**, on any computer, on or off campus.
- **Sales tax.** The University is tax exempt and sales tax is not reimbursable.
- **Fees and penalties:** cancellation fees, no-show fees, parking citations, damage charges.
- **Parking.** Full rental of a garage is not reimbursable. Individual passes may be considered case by case; email the Finance Committee before submitting a request that includes parking.
- **Charges already covered by the CES Partnership.**
- **Purchases that conflict with University food service policy.** Chartwells is the sole caterer on campus. Outside food over \$500 at an on-campus event requires an approved Food Exception Form submitted to Catering at least 14 days before the event, and all food truck requests go through Chartwells.

COMBINED FREQUENTLY ASKED QUESTIONS

Organized by where you are in the process rather than by track.

Getting started

- **Do we really have to train first?** Yes. No request is accepted or reviewed until the applicable training is complete. For programming, an officer attends SGA financial training. For travel, each traveler completes the travel training and quiz.
- **When should we train?** As early in the semester as possible. Funding is first come, first served, and organizations that train late may find funds partially or fully used.
- **Who can submit?** Programming: an RSO officer with TigerZone access. Travel: the traveler, for themselves. Advisors: neither, ever.

How much

- **How much can we get for an event?** \$5,000 per initiative. \$5,000 to \$7,500 only if the initiative is an official collaboration between two or more RSOs, and the collaboration must be reflected in the request.
- **How many events can we fund?** There is no limit on the number of initiatives and no aggregate semester or annual cap per organization. The practical limit is the annual allocation, awarded first come, first served.
- **How much can I get for travel?** \$600 per traveler, per semester, maximum two applications per academic year, one per semester. They cannot be combined into a single larger application.
- **Is summer travel funded?** No. Fall and Spring only.

Submitting

- **Where do I actually go in TigerZone?** Programming: your organization, then Organization Tools, then Finance, then CREATE REQUEST, then Create Budget Request. Travel: your initials in the upper right, then My Submissions, then the Budgeting tab.
- **Why is travel not on our organization page?** Because travel is not an organizational request. Each traveler applies for themselves. Officers and advisors cannot submit on another student's behalf.
- **Create Budget Request is the right choice** for both the initial request and the post-event reconciliation. The other two options in that menu open retired forms and will not reach a reviewer.

Waiting and deciding

- **Does the Finance Committee decide or recommend?** It decides. It is not advisory. Travel decisions are made by the Secretary of Finance.
- **What does an approval mean?** That the Committee has made a funding decision. It is not authorization to spend. The request still has to clear compliance review before funds are released, and anything spent before you are told it has cleared is at your organization's own risk.
- **Can we appeal?** Yes, for pre-event and pre-travel decisions. Submit the appeal form to the Speaker of the Senate; the General Assembly decides. A denial based on a University policy violation cannot be appealed, and post-travel reimbursement denials are final.

Spending and getting paid

- **What if our actual cost is higher than approved?** A 3 percent contingency is available on the total approved amount, requested on the Procedure/Protocol Exception Request form. It is not automatic and not a cushion to plan around; it exists for a small price change after approval. It cannot take you above the tier cap, and anything above 3 percent returns to the Finance Committee. Programming only.

- **My receipt only shows a total.** Not acceptable. An itemized receipt is required and a total-only receipt is returned. If your receipt is not itemized, the itemized detail must be written into the justification field. A direct payment to a vendor requires an itemized invoice rather than a receipt.
- **Will I be reimbursed what I actually paid for travel lodging and meals?** Not necessarily. Both are paid at the per diem rate for your destination regardless of actual cost. Enter your real rate anyway. Meals need no receipts because they are paid at per diem.
- **When is documentation due?** 14 calendar days. For programming, from the event or purchase date. For travel, from your return.
- **Why 14 days and not 30?** University policy requires documentation to reach Accounts Payable within 30 days. Your submission passes through the Finance Committee, compliance review, and Procurement first. The 14 days is the runway those steps need.
- **What if I miss the deadline?** There is an exception process. Use the Procedure/Protocol Exception Request form. Some things cannot be excepted: advisor submissions, missing training, post-travel reimbursement denials, ineligible expenses, exceeding the tier maximum, and an exhausted allocation.
- **How long until we are paid?** After complete documentation is submitted, the request moves through compliance review and Procurement before reaching Accounts Payable, which publishes 7 to 10 business days from its own receipt, longer during busy periods.

WHAT ELSE IS IN THE PACKET

Document	Use it when
SOF Programming Request Process Map	You need the governing detail on programming. This is the authority
SGA Travel Funding Process Map	You need the governing detail on travel. This is the authority
Companion Checklists	You are about to submit, or you are reviewing. Three checklists: Finance Committee, RSO officers, RSO advisors
Quick Reference	You want one page with both tracks side by side
Frequently Asked Questions	You have a specific question. Fuller than the combined section here
TigerZone Submission Guide, SOF Programming	You are submitting for the first time and want the screen-by-screen path
TigerZone Submission Guide, SGA Travel	Same, for travel
TigerZone Reconcile Guide, SOF Purchase and Funding	Your event is over and you are reporting actual expenses
Food and Meal Purchase Justification Form	You bought food. Required for any food purchase
Procedure/Protocol Exception Request Form	You missed a deadline for a documented reason
SGA/RSO Funding Decision Appeal Form	You are appealing a pre-event or pre-travel decision

All are available on the SGA Funding page.

WHO TO CONTACT

For	Contact
Anything funding related	sgafundingrequest@memphis.edu
A programming funding decision	SGA Finance Committee Chair
A travel funding decision	SGA Secretary of Finance
An appeal	Speaker of the Senate
Event space and the CES partnership	Conference and Event Services
Organization registration and RSO training	Student Leadership and Involvement
Graduate student travel	Graduate Student Association

When in doubt about whether something is eligible, **ask before you submit, not after**. A question costs nothing. A denial costs your event.

Companion to the SOF Programming Request and SGA Travel Funding Process Maps, Procedures and Protocols, 2026-2027. Where a conflict exists, the Process Maps govern.