



SOF PROGRAMMING REQUEST: COMPANION CHECKLISTS

Student Organization Fund (SOF) | 2026-2027

University of Memphis, Student Government Association / Student Engagement

These checklists are companion tools to the SOF Programming Request Process Map, Procedures and Protocols. They summarize that document. Where a conflict exists, the Process Map governs.

Checklist 1 is for the SGA Finance Committee. Checklist 2 is for RSO officers. Checklist 3 is for RSO advisors. Officers should start at Checklist 2.

CHECKLIST 1: SGA FINANCE COMMITTEE

Use when reviewing a Budget Request in Step 2.

A. Gate Checks: Complete Before Substantive Review

If any item below fails, the request stops here.

- ☐ Organization is an active Registered Student Organization in good standing
- ☐ Organization completed SGA financial training for the current academic year
- ☐ Request was submitted by an RSO officer with authorized TigerZone access
- ☐ Request was NOT submitted by a faculty or staff advisor. Advisor submission is an automatic denial.
- ☐ Correct tier identified:
 - Tier One, \$1 to \$2,499: submitted at least 14 calendar days before the event*
 - Tier Two, \$2,500 to \$7,500: submitted at least 30 calendar days before the event*
- ☐ Itemized budget attached for any request over \$1,000
- ☐ Funds remain in the 2026-2027 allocation

B. Eligibility Screen: SAFA Funding Limitations

Confirm the request is student driven and broadly accessible.

- ☐ Not connected to an academic program or the operation of an academic program
- ☐ Event is open to and advertised for all University of Memphis students
- ☐ Not a guest lecture or in residency restricted to a limited audience
- ☐ No salaries or stipends for students receiving academic credit for participation
- ☐ Not a faculty led program closed to the general student body
- ☐ Not a department or program using an RSO as a front for its own programming
- ☐ Not hosted on behalf of an academic department
- ☐ Majority of participants are University of Memphis students
- ☐ Requesting organization is a student organization, not a non-student entity
- ☐ Any keynote speaker, guest performer, or contracted presenter is being secured consistent with University contracting, procurement, and payment policy

C. Expense Screen: What Cannot Be Funded

These are the expense-level checks. Section B decides whether the event is eligible; this section decides whether the costs are.

- ☐ No charge already covered by the CES Partnership. Tech, AV, security, staffing, and room setup for UC and Rose Theatre events are paid from partnership funds and are not entered as a funding request
- ☐ No purchase that conflicts 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
- ☐ Food purchases include the RSO Food and Meal Purchase Justification Form. Tips do not exceed 20 percent
- ☐ ****Fundraising.**** No SAFA funds toward creating or purchasing items for resale or donation collection. The event itself may be funded; the items sold may not. The test is whether money changes hands for the item. Decorating cookies at an event is allowable; selling them is not. Giving away wristbands is allowable; selling them is not, even when proceeds go to an outside cause. A virtual donation box is allowable, since SAFA funds paid nothing toward it
- ☐ ****Awards and gifts, sometimes called honorariums.**** Not allowable. The University issues a Form 1099 once cumulative gifts to an individual 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
- ☐ ****Trophies and plaques.**** A separate category, not a gift or a prize. Allowable where the individual item cost is under \$600. Note this is a per-item figure and is not the same as the \$600 cumulative 1099 threshold above
- ☐ No flowers. SEA Guidelines Section 7, Article E lists flowers alongside awards, prizes, and gifts
- ☐ No sales tax. The University is tax exempt, and sales tax is not a reimbursable expense
- ☐ No fees or penalties, including cancellation fees, no-show fees, parking citations, and damage charges

PENDING, as of September 4, 2026. Three determinations remain outstanding and are NOT to be applied as settled rules. First, giveaways: consumable items such as pens, notebooks, candy, t-shirts, cups, and glow sticks are allowable, and a limit of \$24.99 per unit was conveyed, but the source of that figure is being confirmed. Second, philanthropy events such as a charity 5K where SAFA covers reservation costs and proceeds go to a non-profit: clarification is being sought and current practice continues in the interim. Third, parking passes: whether an organization may purchase a limited number for vendors, speakers, or guests, and whether bulk purchase for student attendees is treated differently.

- ☐ Speaker funding formula: \$50 per estimated student attendance or \$15,000 maximum, whichever is lower, plus up to 10 percent for lodging, transportation, and meals. CARRIED FROM 2025-26 AND AWAITING CONFIRMATION FOR 2026-27. Do not apply as settled

D. Hearing Requirements

- ☐ Tier Two: hearing held before any decision is issued
- ☐ Tier One: no hearing required by default
- ☐ If either the RSO or the Committee requested an optional hearing, it was scheduled and held
- ☐ Organization attended any required hearing. Failure to attend a required hearing disqualifies the request.

E. Issuing the Decision

- ☐ Decision recorded as Approve, Deny, or Return
- ☐ If Deny: written rationale documented
- ☐ If Return: specific additional information identified for the RSO

- ☐ Award applied first come, first served against the remaining allocation
- ☐ Remaining allocation balance updated
- ☐ Decision Record completed and attached to the request in TigerZone

F. After Approval

- ☐ Request routed to the Administrative Associate I for Step 3 compliance review
- ☐ Committee understands the Administrative Associate I holds standing authority to return an approved request found non-compliant with University financial policy

CHECKLIST 2: RSO OFFICERS

Part A: before you submit. Part B: after your event.

PART A: BEFORE SUBMITTING A FUNDING REQUEST

A1. Confirm Your Organization Is Eligible

- ☐ Organization is registered and active for the current academic year
- ☐ SGA financial training complete for the current academic year
 - SLI RSO training does NOT satisfy this requirement. They are separate trainings.*
 - Law school RSOs: your Law School registration does NOT satisfy this requirement either.*
- ☐ The person submitting is an officer with authorized TigerZone access
- ☐ Your advisor is not submitting on your behalf. This is an automatic denial.

A2. Confirm You Are Using the Right Process

- ☐ Is your event in the UC or Rose Theatre? Tech, AV, security, staffing, and room setup are covered by the CES Partnership. No funding request is needed for those services.
- ☐ Is this travel? Use the separate SGA Travel Funding process, not this one. Travel is submitted by the individual traveler from their own TigerZone profile, not from the organization page.
- ☐ Everything else, programming, printing, signage, operational needs: SOF Programming Request

A3. Confirm Your Request Is Fundable

- ☐ Event is student driven and open to all UofM students
- ☐ Event is advertised to all UofM students
- ☐ Not tied to an academic program, course credit, or an academic department
- ☐ No stipends or salaries for students receiving academic credit
- ☐ Majority of participants will be UofM students
- ☐ If booking a speaker, performer, or presenter: contracting and payment arranged through University policy before any commitment is made. An engagement arranged outside University policy will not be reimbursed, even if your budget was approved.

A4. Confirm Your Costs Are Fundable

A3 is about the event. This is about the money.

- ☐ Nothing in your budget is already covered by the CES Partnership. If your event is in the UC or Rose Theatre, tech, AV, security, staffing, and room setup are covered and should not be in your request
- ☐ Food purchases comply with University food service policy. Chartwells is the sole caterer on campus. Outside food over \$500 at an on-campus event needs an approved Food Exception Form submitted to Catering at least 14 days before the event, and food trucks go through Chartwells
- ☐ The RSO Food and Meal Purchase Justification Form is completed for any food purchase, and tips do not exceed 20 percent
- ☐ ****Fundraising.**** You may hold a fundraiser. You may not use SAFA funds to buy the things you sell. The event can be funded; the merchandise cannot. Selling cookies, wristbands, or t-shirts means those items come out of your own funds. Giving the same items away is allowable
- ☐ No awards, gifts, or honorariums. No prizes or monetary awards. Gift cards are not an option

- ☐ Trophies and plaques are allowable if each item costs under \$600
- ☐ No flowers
- ☐ Sales tax is excluded from your budget. The University is tax exempt and sales tax is not reimbursable
- ☐ No fees or penalties are included: cancellation fees, no-show fees, parking citations, damage charges

Giveaway items such as pens, notebooks, candy, or t-shirts are allowable, though a per-item price limit is being confirmed. Rules on parking passes and on philanthropy fundraisers are also pending. Ask before you budget for any of those.

A5. Know Your Tier and Deadline

- ☐ Tier One, \$1 to \$2,499: submit at least 14 calendar days before the event
- ☐ Tier Two, \$2,500 to \$7,500: submit at least 30 calendar days before the event
- ☐ Itemized budget prepared if the request exceeds \$1,000
- ☐ Submitting as early as possible, since funding is first come, first served until the allocation is exhausted

A6. Submit

- ☐ In TigerZone, go to your organization, then Organization Tools, then Finance
- ☐ Select CREATE REQUEST, then Create Budget Request

Create Budget Request is correct even though the process is called something else. The other two options open retired forms.

- ☐ Select the process: SOF Programming Request 2026-2027
- ☐ Complete all fields: event and purpose description, itemized budget, vendor information
- ☐ Submit. The request routes automatically to the SGA Finance Committee.
- ☐ If a hearing is required for Tier Two, or requested for Tier One, attend as scheduled. Missing a required hearing disqualifies the request.
- ☐ Wait for approval before spending. Approval is not guaranteed.

PART B: AFTER YOUR EVENT, RECONCILIATION

B1. The Deadline

- ☐ All post-event documentation submitted within 14 calendar days of the event or purchase date
- ☐ Late submissions are denied and funds are not disbursed, except in documented extenuating circumstances

B2. Submit the Purchase and Funding Request

- ☐ Same path as before: Organization Tools, then Finance, then CREATE REQUEST, then Create Budget Request
- ☐ This time select the process: SOF Purchase / Funding Request 2026-2027

Steps 1 through 5 are identical to the request you already submitted. Only the process you select is different. If you find yourself entering estimates again, you picked the wrong one.

- ☐ Enter your Approved Budget Request Number from the original request
- ☐ Enter actual expenses as line items, not the approved estimates
- ☐ Attach the itemized receipt or invoice to each budget line item
- ☐ Attach the event advertisement or meeting agenda under Event Documentation
- ☐ If any money was raised at your event, by ticket sales, donations, or any other means, report the amount raised in your post-event documentation. This is required whether or not SAFA funds touched the fundraising
- ☐ Student officers: self-submit your own portion directly in Oracle. This is not done on your behalf.

B3. Receipt Standards: Check Every Receipt

- ☐ Shows business name and date of purchase
- ☐ Itemized: specific items, quantities, and prices
- ☐ Shows payment method, cash, check, or last four digits of the card
- ☐ Shows the transaction was completed
- ☐ Full document or full page photo. No screenshots, no cropped images.
- ☐ Paid with actual money. Purchases made with points or rewards cannot be reimbursed.
- ☐ If submitting a bank statement, it is paired with a receipt showing what was purchased, with unrelated personal information redacted
- ☐ Food or catering: itemized receipt or invoice attached. Per diem does not apply to programming expenses.
- ☐ Food purchases: RSO Food and Meal Purchase Justification Form completed and attached
- ☐ Food purchases: attendee list provided for meals only, not required for snacks or refreshments
- ☐ Food purchases: tip does not exceed 20 percent. Anything above 20 percent is not reimbursed and comes out of the purchaser's pocket.
- ☐ Reimbursement is going to the person who actually paid. If someone else paid, additional steps are required.

B4. Paying a Vendor Directly

- ☐ Vendor provided an itemized INVOICE. Accounts Payable will not accept a standard receipt for direct vendor payment.

CHECKLIST 3: RSO ADVISORS

Your role in the funding process, and its limits.

A. What Advisors DO

- ☐ Ensure you are listed in the Advisor and Admin section of your organization's TigerZone registration
- ☐ Review and approve or deny event details in TigerZone for compliance and appropriateness
- This is a separate review, completed before any funding review occurs.*
- ☐ Help officers confirm eligibility before they submit. See Checklist 2 above.
- ☐ Remind officers of submission deadlines: 14 days for Tier One, 30 days for Tier Two
- ☐ Remind officers of the 14 day post-event reconciliation deadline
- ☐ Encourage officers to review receipts against the receipt standards before submitting
- ☐ Direct officers to complete SGA financial training, since funding requests will not be accepted without it

B. What Advisors DO NOT Do

- ☐ Do NOT submit funding or reimbursement requests on behalf of the organization

Under no circumstances will a request submitted by a faculty or staff advisor be reviewed. Submission by an advisor is an automatic denial.

- ☐ Do NOT pay for student organization events out of personal funds under any circumstance

C. Questions Worth Asking Your Officers

- Have you completed SGA financial training this academic year?
- Is your event open to and advertised for all UofM students?
- Is this event connected to an academic program or department in any way?
- Is your event in the UC or Rose Theatre? If so, CES may already cover what you are requesting.
- Are you booking a speaker or performer? Has contracting gone through University policy?
- What tier is this, and does your submission date meet the deadline?
- Who is submitting, and are they an officer with TigerZone access?
- After the event: do you know your 14 day reconciliation deadline?