STUDENT ORGANIZATION FUND (SOF) PROGRAMMING REQUEST

Process Map, Procedures and Protocols | 2026-2027

Version 14 | Revised August 25, 2026, following completion of TigerZone walkthrough testing and the go-live of all three processes.

*Programming, Printing **and** Operational Requests*

University of Memphis, Student Government Association / Student Engagement

PURPOSE OF THIS DOCUMENT

This document establishes a single, clear, and current process for Registered Student Organizations (RSOs) requesting SOF Programming funding, covering event programming, printed materials, and general operational needs. It replaces outdated and conflicting guidance from prior years, consolidates the terminology confusion between former categories (Operational Assistance, SEA, SAFA), and defines a workflow that reduces stress for student leaders, faculty/staff advisors, and University staff processing these requests.

A NOTE ON TERMINOLOGY

This document uses three distinct terms. *Procedure* refers to the steps - how a request is submitted, routed, reviewed, and paid. *Protocol* refers to the standards those steps must meet - eligibility, documentation, and deadlines. *Policy* is reserved for University policy, which governs both.

WHAT'S CHANGED FOR 2026-2027

SAFA: Clarified, Not Retired

- "SAFA" remains in active use. It is the name of the overall Student Activity Fee Allocation budget, not a separate application category. SOF Programming draws from the SAFA budget.

Terminology Retired

- "SEA" (Student Event Allocation): retired. Do not use.
- "Operational Assistance" as a separate funding category: retired. Now folded into the single SOF Programming Request.
- "Solicitation of Funds": retired as a funding request term. This phrasing appeared in prior approval correspondence and in a TigerZone form name. It is no longer used for requesting or reimbursing SOF Programming funds. The term remains in use by Student Leadership and Involvement for organizations reporting their own fundraising activity, which is a separate reporting function and not a funding request.

Scope - Main Campus and Law School

This process governs SOF Programming funding for Main Campus and Cecil C. Humphreys School of Law organizations. **The Lambuth Campus is not covered by this process.** Lambuth submits its own budget proposal during the Student Activity Fee funding cycle and receives a separate allocation overseen by its own student governance body. Lambuth organizations should contact Lambuth Student Services.

One Bucket for Programming

All programming-related funding (event costs, flyers, signage, printed materials, and general operational needs) now runs through a single process: the SOF Programming Request. There is no longer a separate application for "operational assistance."

CES Partnership: Not an Application

SGA has partnered with Conference and Event Services (CES) to cover certain event charges for RSOs hosting events on campus. There is no application and no funding request for covered items.

How it works: the organization books its event directly through CES. CES confirms the booking with a reservation confirmation, with the RSO advisor copied. Covered charges are handled entirely through the partnership and are paid from separate partnership funds, not from the money your organization requests through SOF. Your booking confirmation will show the reservation without a charge posted for covered items.

Your CES confirmation is not a bill. Do not submit it with your reimbursement documentation. Covered partnership charges never appear in your SOF Programming Request and are never something you pay or seek reimbursement for. Submitting a CES confirmation as if it were an invoice creates duplicate records and delays processing.

Covered by the partnership:

- AV and technology equipment charges
- AV technician charges
- Extended hours fees
- Police services / security charges
- Facilities Services charges for weekend events, which includes Custodial Services and Landscape Services (does NOT include damage or excessive cleaning charges assessed after the event)
- Room rental fees waived when the event is a philanthropy event, meaning an event raising funds for a local, national, or international non-profit, NOT an event raising funds for the RSO itself. The waiver applies only when all proceeds go directly to the philanthropy (see the philanthropy standard under Fundraising Events)
- Set-up charges for special requests (dance floor, marley/MDF floor, staging, and similar)
- Ticketing fees

Not covered - the organization is financially responsible:

Anything outside the covered list above is the RSO's responsibility. This falls into two categories, and the difference matters:

- **Additional services and rentals the organization chooses to add -** for example, table linens, specialty rentals, or equipment beyond what the partnership covers. These are the organization's expense, but they MAY be included in a SOF Programming Request as a budgeted event cost. Include them in your itemized budget at the time of submission.
- **Fees and penalties -** no-show fees, last-minute setup change fees, and damage or excessive cleaning charges. These are the organization's expense and will NOT be funded by SGA under any circumstance. They cannot be included in a funding request or submitted for reimbursement.

- **Cancellation fees -** special events in the Ballroom, Rose Theatre, UC Theatre, and large outdoor events must be cancelled at least five (5) business days in advance to avoid a cancellation fee. Cancellation fees are the organization's expense and are not funded by SGA.
- **Parking services charges -** parking is the organization's expense and is not funded by SGA. It cannot be included in a funding request or submitted for reimbursement.

Also not covered: department-sponsored or external events, and room rental for a fundraiser benefiting the RSO itself.

Plan ahead. If your event needs something the partnership does not cover, budget for it and include it in your request before the event - not after.

CES review completed August 13, 2026. The Executive Director for Conference and Event Services reviewed all CES material in this document and confirmed the covered and not-covered lists, the billing description, the philanthropy standard, the security request flow, and CES participation in training. The CES-SGA Event Partnership document is maintained by Conference and Event Services and is available separately on the Conference and Event Services page of the University website. Where that document and this section differ, contact CES for the current partnership terms.

First-Come, First-Served Award Basis

SOF Programming funding for 2026-2027 is awarded on a first-come, first-served basis. Once the total allocation is exhausted for the year, the application will close. Because mandatory financial training must be completed before any request can be submitted, organizations that complete training later in the year may find the allocation partially or fully exhausted. Organizations are strongly encouraged to complete training and submit requests as early as possible.

Planning Ahead - Fiscal Year Close and Spring Events

No events may be held during finals week. Per University guidance, RSO events are not held during the final examination period in either semester. This applies regardless of funding source.

SOF Programming funds are additionally tied to the fiscal year, which closes June 30. A request must complete its full cycle - approval, event, reconciliation, compliance review, Oracle entry, Procurement, and Accounts Payable - before that date.

Each semester has its own cutoff, driven by the study day and examination period.

Fall 2026

- **Last fundable event date: Wednesday, December 2, 2026 -** no events December 3 through December 10
- **Last Tier One submission: Wednesday, November 18, 2026** (14 calendar days before)
- **Last Tier Two submission: Monday, November 2, 2026** (30 calendar days before)
- Reconciliation for a December 2 event is due **Wednesday, December 16, 2026**

Spring 2027 - this is also the fiscal-year cutoff. Working backward:

- **Last fundable event date: Wednesday, April 28, 2027 -** the last day of spring classes and exams. No events during the study day (Thursday, April 29) or the examination period (Friday, April 30 through Thursday, May 6)
- **Last date to submit a Tier One request: Wednesday, April 14, 2027** (14 calendar days before)
- **Last date to submit a Tier Two request: Monday, March 29, 2027** (30 calendar days before)

- Reconciliation for an April 28 event is due **Wednesday, May 12, 2027**

Organizations planning late-spring programming should submit early in the year rather than waiting until the 14- or 30-day advance minimum. The advance deadlines are a floor, not a target, and funding is awarded first-come, first-served - an organization that waits until the minimum window may find the allocation exhausted regardless of how far ahead of its own event it submitted.

An event held after the fiscal-year cutoff is not prohibited. It simply cannot be funded through the SOF Programming process for that fiscal year. Organizations may hold late-spring or summer programming using other funding sources, departmental partnerships, or organizational funds, or may plan the event for the following fiscal year and submit when the new allocation opens.

THE THREE FUNDING BUCKETS: QUICK REFERENCE

Bucket	Covers	Process	Approval Body
SOF Programming Request	Event costs, flyers, printing, signage, general operational needs	Organization Tools, then Finance, then CREATE REQUEST, then Create Budget Request. SOF Programming Request before the event; SOF Purchase / Funding Request after	SGA Finance Committee (hearing required Tier Two only; optional Tier One)
CES Partnership	Tech, AV, security, staffing, room setup for events in the UC, Rose Theatre, Student Plaza, and Alumni Mall Lawn only	No application - handled through the partnership, separate from SOF funds	N/A - pre-approved partnership fund
Travel Funding	Conference/program travel for undergrad and law students (grad students use separate Graduate School process)	Submitted by the individual traveler from their own TigerZone profile: initials, then My Submissions, then Budgeting. Not from the organization page	SGA Finance Committee (travel hearing)

SAFA FUNDING LIMITATIONS: WHAT IS NOT ELIGIBLE

SAFA funding is intended to support initiatives that are student-driven and broadly accessible to University of Memphis students. Funding requests connected to an academic program or the operation of an academic program are NOT eligible for SAFA funding and will not be awarded.

Examples of Ineligible Academic Program / Operation Activity

- Guest lectures or in-residencies that are not open to and advertised for all University of Memphis students
- Salaries or stipends for students receiving academic credit for participation
- Faculty-led programs that are not open to or advertised for all University of Memphis students
- Departments or programs using Registered Student Organizations (RSOs) as a front for programming or events
- Non-student organizations
- Events hosted on behalf of academic departments
- Conferences where the majority of participants are not University of Memphis students

- Similar activities not driven by and broadly accessible to the general student body

This list is illustrative, not exhaustive. These conditions are subject to change based on special circumstances or University need. When in doubt, an RSO or advisor should confirm eligibility with the Administrative Associate or SGA Finance Committee BEFORE submitting a request.

Events During the Study Day and Final Examination Period

Student events are not permitted from the study day through the last day of finals, in either the fall or spring semester. Requests for events scheduled during this period will not be funded.

Fall 2026 - no student events **Thursday, December 3 through Thursday, December 10, 2026**. Study day is Thursday, December 3; the examination period runs Friday, December 4 through Thursday, December 10. The last fundable fall event date is Wednesday, December 2.

Spring 2027 - no student events **Thursday, April 29 through Thursday, May 6, 2027**. The last day of classes and exams is Wednesday, April 28; the study day is Thursday, April 29; the examination period runs Friday, April 30 through Thursday, May 6.

Exceptions are granted by the Provost's Office only. Neither SGA nor Student Engagement can authorize an event during this period. An organization seeking to hold an event during the study day or examination period must address that request to the Provost's Office directly. Approval from the Provost's Office does not by itself make the event fundable - the request must still meet every other requirement in this document, including the submission and reconciliation deadlines.

Prohibited Purchases

SAFA funds may not be used for the following, regardless of how the request is framed:

- Alcohol or tobacco products, or events at which alcohol or tobacco is used
- Charitable or philanthropic donations, whether cash or supplies
- Furniture, electronics, computers, or any inventoried property
- Purchases that violate University food service policy (see Food and Catering Requirements below)
- Gifts for members, officers, or graduating seniors
- Instructional or academic course-related expenses
- Off-campus events (does not apply to approved travel)
- Personal purchases
- Salaries or stipends for RSO officers or members
- Continuing education credits

Fundraising Events - Philanthropy vs. Organizational

Eligibility depends on who benefits from the funds raised. This distinction mirrors the CES Partnership terms and applies consistently across both.

- **Philanthropy events -** events raising funds for a local, national, or international non-profit organization, where all proceeds go directly to the philanthropy. These are eligible for SOF Programming support on the same basis as any other RSO event, and CES waives room rental. The room rental waiver applies only when all proceeds go directly to the philanthropy. If any portion of proceeds goes to something other than the philanthropy (for example, costumes, linens, or other event costs), room rental will be charged. This holds even when a sponsor pays for some costs: a sponsor may cover food, costumes, or similar expenses, but room rental is still charged unless all proceeds go to the philanthropy. Separately, SAFA funds may NOT be used for the charitable donation itself; donations of cash or supplies to a non-profit are not an allowable expense. SAFA supports the cost of holding the event, not the gift.

- **Organizational fundraisers -** events raising funds for the RSO itself. The costs of holding an organizational fundraiser are not reimbursable, and CES room rental fees WILL be applied to the organization.

Keynote Speakers, Performers and Contracted Presenters

Keynote speakers, guest performers, and contracted presenters must be secured in a manner consistent with University policy, including all contracting, procurement, and payment requirements. Any engagement arranged outside of University policy will not be considered for reimbursement, regardless of whether the request was previously approved.

University Contracting Requirements (BF4008)

Any agreement obligating the University to pay an external party is a contract and must be signed by the President or an authorized designee. **A student officer, advisor, or staff member who signs an agreement they are not authorized to sign may be held personally liable for the obligations of that contract.** Never sign a performance agreement, speaker agreement, or vendor contract on behalf of your organization or the University.

- Personal, professional, or consulting service agreements under $5,000 may be approved by an authorized University official using the Request for Payment to Individuals or Contractor form
- Agreements of $5,000 or more require approval by the Director of Procurement and Contract Services
- Agreements of $10,000 or more must be competitively bid unless sole-source justification is provided and approved
- Vendor-generated or non-standard agreements require Office of Legal Counsel review and additional lead time
- All agreements must be fully approved by all parties BEFORE the effective start date

Build contracting lead time into your planning. A Tier Two speaker engagement can require procurement review, legal review, and competitive bidding - none of which fit inside a 30-day window comfortably.

[SGA ACTION ITEM] OPEN: The 2025-26 SOF Guidelines set a speaker funding formula: $50 per estimated student attendance or a $15,000 maximum speaker fee, whichever is lower, with up to 10% additional for lodging, transportation, and meals. SGA should confirm whether this formula carries forward for 2026-27 before it is published here.

ANNUAL ALLOCATION AND SAFA HEARING CYCLE

- 2026-2027 Total SOF Programming Allocation: $331,000
- SAFA Hearing Cycle (Fiscal):
- Budget Proposal Submitted: March
- Hearing: April
- Decision: May (prior to fiscal year close, June 30)
- Funds are awarded first-come, first-served until the allocation is exhausted for the year

Funding Cap (revised August 20, 2026): $7,500 per initiative. Each SOF Programming request is capped at **$7,500 per initiative**. There is no aggregate semester or annual ceiling per organization. An organization may submit multiple initiatives, each subject to the $7,500 maximum.

Because there is no per-organization ceiling, total funding available to any organization across the year is bounded by the availability of the annual allocation, which is awarded first-come, first-served. Submit early. Requests approaching the per-initiative cap must include rationale for the funding level requested.

This replaces the previous cap of $20,000 per organization per semester, effective immediately for 2026-2027. SGA Travel funding and the CES partnership are separate and are not counted against the per-initiative programming cap.

SOF PROGRAMMING REQUEST: STEP-BY-STEP PROCEDURE

Prerequisite - Before Any Request Can Be Submitted

- RSO must be an active, Registered Student Organization in good standing
- RSO must have completed the mandatory RSO Financial Training for the current academic year (see Training section below). Completion is verified through the organization's active status in TigerZone - NO funding requests will be accepted or reviewed until training is complete
- Requests may only be submitted by an RSO officer with authorized access in TigerZone
- ADVISORS MAY NOT SUBMIT FUNDING REQUESTS. Under no circumstances will a funding or reimbursement request submitted by a faculty/staff advisor be reviewed. Submission by an advisor is an automatic denial.

Step 1 - Submit Request via TigerZone

- In TigerZone, go to your organization, then **Organization Tools**, then **Finance**
- Select **CREATE REQUEST**, then **Create Budget Request**. Create Budget Request is the correct selection even though the process is named differently. The other two options in that menu, Create Purchase Request and Create Funding Request, open retired forms and will not route to a reviewer
- Select the process: **SOF Programming Request 2026-2027**
- Create a Budget Request first - this is your proposal and itemized plan, submitted before any money moves
- Complete all required fields - event/purpose description, itemized budget, vendor information (if applicable)
- Tier One ($1 - $2,499): submit at least 14 calendar days before the event
- Tier Two ($2,500 - $7,500): submit at least 30 calendar days before the event; itemized budget required for any request over $1,000
- Requests are accepted throughout the academic year. The controlling factor is the event date: a request must be submitted far enough in advance to meet the applicable tier deadline, and the event must occur early enough that post-event reconciliation can be completed within 14 calendar days. Events scheduled too late in the term to allow reconciliation before the close of the funding period cannot be funded
- Once submitted, the Budget Request automatically routes within TigerZone to the SGA Finance Committee for Step 2 review
- If a hearing is required (Tier Two) or requested (Tier One, optional), attend as scheduled - missing a required hearing disqualifies the request
- After approval and after your event, return by the same path and select the process **SOF Purchase / Funding Request 2026-2027** to report actual expenses and attach receipts (see Step 5). Steps 1 through 5 of the submission are identical for both processes; only the process selected differs

System Behavior and Its Limits (verified August 25, 2026)

The Administrative Associate I completed full walkthrough testing of all three processes prior to the August 25, 2026 go-live. The results below distinguish what the system enforces from what a reviewer enforces. Future staff should not assume a control is automated because it is written here.

Enforced by the system

- Routing. A submitted request routes to the SGA Finance Committee without staff action. Verified on all three processes
- Required fields. A page will not advance while a visible required field is blank
- Conditional display. A question configured with Display Logic appears only when its condition is met. Verified on both the programming and travel processes
- The submission window. A process does not appear at all outside its Available from dates

NOT enforced by the system, enforced by review

- **Tier deadlines.** The 14 and 30 calendar day advance minimums are not calculated or blocked by TigerZone. A request submitted inside the window will be accepted by the system and returned at review
- **Date sanity.** Date fields accept any value. Testing confirmed the system accepts a return date earlier than the departure date, and accepts dates in the past. Reviewers verify dates
- **Eligibility gates.** Answering a gate question in a way that indicates ineligibility displays the stop text but does not prevent the applicant from continuing. Skip logic was tested and produced unpredictable routing, so it was removed in favor of stop text plus review. This is a deliberate decision, not an oversight

Platform defect, resolved. A question marked Required that also carries Display Logic is counted against submission even when hidden. The applicant cannot answer it and cannot submit. This was found on the SOF Programming process on August 25, 2026 and resolved by unchecking Required on the three conditional questions on the Additional Details page. Display Logic alone is sufficient enforcement. Any conditional question added to any process in future must be left unchecked for Required.

Step 2 - SGA Finance Committee Review and Decision

- SGA Finance Committee reviews the request. The Finance Committee is a standing committee of the SGA Senate. Per the Senate Bylaws, Senators submit committee preferences and are confirmed to committees by the Speaker of the Senate. The Secretary of Finance serves as the primary financial officer of the Association.
- Tier One ($1 - $2,499): NO hearing required by default - Committee reviews the request and issues a decision without an in-person meeting
- Optional Hearing Request: either the RSO or the SGA Finance Committee may formally request an in-person hearing if clarification is needed on a Tier One request, even though it is not required by default
- Tier Two ($2,500 - $7,500): hearing IS required - RSO must meet with the Committee to discuss the proposal before a decision is issued
- The Finance Committee meets on a regular schedule during the academic term. **Committee cadence (confirmed by SGA, August 11, 2026): no less than two meetings per month**, with additional meetings driven by submission volume. This replaces the prior weekly-review language from the 2025-26 SOF Guidelines. Scheduled for the August 19 amendment review. Organizations should plan for review at the next scheduled meeting following submission
- Committee may Approve, Deny (with rationale), or Return (request for additional information) for either tier
- Decision awarded first-come, first-served against the remaining $331,000 allocation for the year

Decision Authority (confirmed by SGA, August 11, 2026): The SGA Finance Committee decides funding requests. The Committee is not advisory. This resolves the prior open question about whether the Committee decides or recommends; the reconciliation of advisory language in the Senate Bylaws is scheduled for the August 19 amendment review.

Appeals Process (established by SGA, August 11, 2026)

An RSO may appeal a Finance Committee decision. This process applies to both SOF Programming and Travel Funding decisions.

Step	Action
1. Form	RSO completes the appeal form
2. Submission	Appeal submitted to the Speaker of the Senate
3. Scheduling	Speaker places the appeal on the General Assembly meeting calendar
4. Notification	Administrative Associate I and Graduate Assistant are copied
5. Packet	Administrative Associate I or Graduate Assistant assembles a packet if required, provided to the Secretary of Finance and General Assembly in advance of the meeting
6. Decision	Heard and decided by the General Assembly

Not appealable: a denial issued because a request violates University policy. The General Assembly cannot overturn University policy.

Conduct: all parties are reminded that the Student Code of Rights and Responsibilities applies. Appeals are decided on the facts presented.

The appeal form is built and available in TigerZone/SGA records.

Requires amendment. Senate Bylaws Article VI, Section 3 names the Executive Council as the reviewing body. SGA has established the General Assembly instead. Scheduled for the August 19 amendment review.

Step 3 - Compliance Review (Administrative Associate)

Once the SGA Finance Committee approves a request, the Administrative Associate I serves as the compliance checkpoint before disbursement - verifying the approved decision complies with University financial policy (purchasing guidelines, allowable expense types, vendor requirements) prior to processing.

CONFIRMED AUTHORITY: When a compliance issue is identified after SGA Finance Committee approval, the Administrative Associate I holds standing authority to return the request to the SGA Finance Committee or the RSO for correction. No additional escalation is required to exercise this authority.

Step 4 - Disbursement / Payment Processing (Oracle)

- Once the Budget Request is approved, the RSO Officer submits the Purchase/Funding Request in TigerZone with receipts and event documentation to initiate reimbursement or payment
- Approved and compliance-cleared requests are processed for payment via Oracle (transitioned from legacy system January 2026)
- Administrative Associate I or designee submits as third-party processor for RSO/SGA transactions
- Student workers/officers must self-submit their own portion directly in Oracle - this step is NOT done on their behalf and requires organization-level training (see Training section)
- Payment methods per University policy: personal reimbursement, invoice paid directly by the University, and/or contract processed by SGA

Step 5 - Post-Event Documentation and Reimbursement Deadline

- NEW PROTOCOL: All post-event/post-expenditure documentation must be submitted within 2 weeks (14 calendar days) of the event or purchase date

- Required documentation, uploaded directly in TigerZone: itemized receipts and/or invoices attached to each budget line item, and a copy of the event advertisement or meeting agenda
- For any food purchase: the completed RSO Food and Meal Purchase Justification Form, with the itemized receipt attached
- CONSEQUENCE FOR MISSED DEADLINE: Requests for reimbursement submitted after the 14-day window will be denied and funds will not be disbursed, except in cases of documented extenuating circumstances
- EXTENUATING CIRCUMSTANCES - APPROVED AUTHORITY: Exceptions to the 14-day deadline are granted at the discretion of the Administrative Associate I, with notification to the SGA Finance Committee. Documentation of the circumstance is required in all cases.
- HOW TO REQUEST: Exception requests are submitted using the Procedure/Protocol Exception Request form. Requests submitted by any other means will be redirected to the form.

Exception Recordkeeping Protocol

All exception requests are documented and tracked, whether granted or denied. The Administrative Associate I records every request received - including requests returned as ineligible - in the SGA/RSO Procedure and Protocol Exception Log, capturing the requesting organization, the requirement at issue, the determination, and the rationale.

This record exists for three reasons: to ensure consistent treatment across organizations, to give the SGA Finance Committee visibility into how discretion is being exercised, and to identify whether a particular deadline is generating repeated exceptions - which is evidence that the procedure should be revised rather than repeatedly excepted.

The log is maintained internally and is not published. Individual determinations are communicated only to the requesting organization and the SGA Finance Committee.

Food and Catering Requirements (BF4002)

Chartwells (UofM Dining) holds exclusive catering rights for the University, including the Lambuth Campus. Outside food at an on-campus event requires an approved exception, with several significant carve-outs.

When an exception is NOT required:

- **Pizza.** Chartwells has granted blanket approval. RSOs may bring pizza on campus regardless of total cost, with no exception form
- **Student events with total food value under $500.** Receipts must be kept to prove value. This exception **cannot be combined with a Chartwells order** - if you order anything from Chartwells for the event, the under-$500 exception no longer applies
- **Off-campus events.** The requirement applies to food brought onto campus
- The Cecil C. Humphreys School of Law and several other locations are outside the exclusivity agreement

When an exception IS required:

- Outside food at an on-campus student event where total food value is **$500 or more**
- **Donated food** valued above the threshold. Donation does not exempt you from the exception process

Food trucks: ALL food truck requests must go through Chartwells, without exception.

Two rules that catch organizations out:

- **You cannot combine a Chartwells order with the exception.** If you order anything from Chartwells for an event, the $500 outside-vendor exception no longer applies to that event

- **"It costs less" is not a valid reason.** The form states explicitly that cost, value, or donated status is not a justifiable exception. Your stated reason must be something other than price

Bake sales: approval is generally granted for one bake sale per semester per organization for fundraising.

Selling food: organizations selling food must also complete a Solicitation for Funds form in TigerZone. This is a Student Leadership and Involvement fundraising reporting requirement, separate from any SOF funding request.

Third-party vendors: if a third-party vendor is involved, a transient use agreement must be completed and routed through Procurement, with all conditions met.

How to request an exception - watch the timeline

Complete the *Application for Exception to Bring Food on Campus*. The form is fillable and includes electronic signature fields.

Step	Who	Deadline
1. Applicant and activity information	RSO officer	-
2. Faculty/Staff Advisor signature	Your advisor	-
3. Submit to Catering Office	RSO officer	**No less than 14 days before the event**
Approval returned	UM Dining	At least 5 days before the event

Submit to **catering@memphis.edu**. Questions: dining@memphis.edu or 901.292.9674.

This timeline runs parallel to your funding request, not after it. A Tier One funding request is due 14 calendar days before the event, and the food exception is due to Catering on the same schedule. Do not wait for funding approval to request the food exception - start both at once.

An approved exception form must be submitted with your reimbursement or payment request. Without it, an outside-vendor food expense over $500 is not reimbursable regardless of your funding approval.

Note on advisor signatures: Step 2 of this form requires your faculty/staff advisor's signature. This is an event approval, not a funding request, and is a legitimate advisor function. It does not conflict with the prohibition on advisors submitting funding or reimbursement requests.

Documentation requirements for all food purchases

- Itemized receipt or invoice is required. If the receipt is not itemized, the itemized detail must be provided in the description field
- Complete the **RSO Food and Meal Purchase Justification Form** and submit it with the receipt
- Attendee list required for meals; not required for snacks or refreshments
- **Tips are reimbursable up to a maximum of 20%.** Any amount above 20% is the personal expense of whoever paid
- University funds may not be used to purchase alcoholic beverages under any circumstance
- Meal expenditures must withstand the test of public scrutiny, support the University mission, and be reasonable in amount

Event Security (GE2020)

Events requiring security personnel for more than one hour are "special events" under University policy. Security is generally required for dances, parties, after-hours events, major entertainment events, and events advertised externally where the general public is invited.

- When CES is arranging the event, CES makes the security request. The organization is responsible for providing all details CES needs to determine security requirements with University Police Services: cost estimates, event details, the names of any off-campus speakers, VIP names, and whether the general public is invited. Security needs are determined based on guidelines set by the Event Review Committee

- Provide these details to CES early. Security determinations depend on them, and incomplete information can delay or prevent approval of the event
- Organizations may NOT contract outside security services without consulting University Police Services

Security charges are covered under the SGA-CES Partnership. The organization's responsibility is to provide CES with complete and timely event details so the security request can be made.

Use of University Services First (BF4036)

University departments hold right of first refusal for services they are able to provide. Before engaging an external vendor - for printing, event services, or similar - the organization must use the available University service or obtain a waiver from the director of the department that provides it.

Event Changes and Cancellations

If an approved event is postponed, rescheduled, relocated, or cancelled, the organization must communicate the change through TigerZone using notes and attachments on the existing request. Changes communicated by email will be handled case by case and may delay processing. Unreported changes are a common cause of processing delays and can result in denial of reimbursement.

Food and Meal Purchases - Additional Documentation Required

These requirements apply to any food purchase - groceries, wholesale clubs, restaurants, or catering - regardless of how it was paid for. They apply to organization reimbursements the same way they apply to University procurement card transactions.

- **Itemized receipt is required.** If the receipt is not itemized, the itemized detail must be provided in the description field of the submission
- **Business justification is required** - a clear statement of the purpose of the purchase, entered in the description field or documented on the P Card Meal Purchase Justification Form (https://www.memphis.edu/procurement/pdf/pcard_meal.pdf)
- **Attendee list is required for meals.** Provide the list of attendees in the submission or attach it on a separate sheet. This is not required for snacks or refreshments
- **Attach the meeting agenda, event advertisement, or a summary of the event** whenever possible
- **Tips are reimbursable up to a maximum of 20%.** Any amount tipped above 20% will not be reimbursed and becomes the responsibility of the person who paid

For all other purchases, attach an itemized receipt and state the business purpose in the description. If the receipt is not itemized, include that detail in the description as well.

What Happens After You Submit - and Why Timing Matters

Approval of your funding request is not the same as payment. Once your organization submits complete post-event documentation, the request enters University financial processing, which involves several offices outside SGA:

- The Administrative Associate I reviews the submission for compliance; the Administrative Associate I or designee enters it into Oracle
- The request routes through Procurement, and through the Business Officer and Student Affairs for approval
- Once approved and purchased through Procurement, the transaction is receipted in Oracle

- The documentation is then submitted to Accounts Payable for payment. Accounts Payable is responsible for all University disbursements other than payroll, stipends, scholarships, and student financial aid. Current processing time is 7 to 10 business days

Each of these steps carries its own requirements. Incomplete or non-compliant documentation is returned, and the process restarts from that point.

Neither SGA nor the Administrative Associate releases funds. The University does. SGA approves the award and verifies compliance; payment is issued through University financial processes on the University's timeline.

This is why the 14-day deadline exists. University policy requires travel and expense documentation within 30 days. The 14-day SGA deadline preserves the remaining time needed to move a complete, compliant packet through the offices above and meet the University's requirement. A request submitted on day 29 cannot be processed in time, regardless of how complete it is.

The single most effective thing your organization can do to be reimbursed quickly is submit complete, compliant documentation the first time. Use the receipt standards in this document before you submit, not after something is returned.

Following Up on a Reimbursement

Once a request reaches Accounts Payable, follow-up goes directly to that office. The Administrative Associate I or designee can confirm the date a request was submitted, but cannot expedite or track payment once it is in the Accounts Payable queue.

- Accounts Payable: accountspayable@memphis.edu | 901.678.2271
- https://www.memphis.edu/accounting/ap.php

Published processing time is 7 to 10 business days, though actual turnaround can run longer during high-volume periods.

RECEIPT AND DOCUMENTATION PROTOCOL

- Receipt must show business name and date of purchase
- Receipt must be itemized - specific items, quantities, and prices
- See "Who Gets Paid Determines What You Need" below for receipt versus invoice requirements
- Food/catering (e.g., restaurant orders, catering for an on-campus event): itemized receipts or invoices ARE required - per diem does not apply to programming expenses
- Bank statements alone are NOT acceptable - must be paired with a receipt/confirmation showing specifically what was purchased; personal information other than account holder name, address, and the relevant transaction line should be redacted
- Receipt must clearly indicate payment method (cash, check, or last 4 digits of card) and that the transaction was completed
- Reimbursement goes to the person who made the purchase; if someone else paid (e.g., a parent), additional steps are required to reimburse that individual instead
- No screenshots or cropped images - full, complete document or full-page photo required
- Purchases made using points or rewards programs cannot be reimbursed - actual money must have been used
- NOTE: Travel-related documentation standards (lodging, mileage/gas, and meal per diem) are governed by the separate SGA Travel Funding Process Map and do not apply to SOF Programming requests

THREE WAYS TO PAY - CHOOSE BEFORE YOU BUY

1. The University purchases on your behalf

Student Engagement can make purchases for your organization using a University procurement card, or through Oracle Punch Out for Amazon orders. No one fronts money, no reimbursement is needed, and the transaction is compliant by default.

Requirements:

- Your Budget Request must be **approved before any purchase is made.** All purchases are deducted from your approved amount
- Purchases are made during **scheduled appointment times only.** Contact the Administrative Associate to reserve a slot. Walk-up and same-day requests cannot be accommodated
- Bring your item list, links, and quantities to the appointment. Purchases cannot be made from a verbal description

This is the simplest option for your organization. It removes the reimbursement wait, removes the risk of a receipt being rejected, and removes the possibility of a student being out of pocket.

2. The University pays the vendor directly

An itemized **invoice** is required, and the business must be registered in Oracle. See the vendor registration requirements below.

3. A student pays and is reimbursed

An itemized **receipt** is required. Reimbursement is issued to the person who made the purchase.

Tax Exemption

The University of Memphis is tax exempt. If a vendor will honor the exemption, request a tax exemption letter to provide to the supplier **before** you purchase. Exemption letters are already on file with some vendors.

Sales tax paid unnecessarily is not reimbursable. Ask before you buy, and request the letter through the Administrative Associate with enough lead time to receive it.

WHO GETS PAID DETERMINES WHAT YOU NEED

There are two payment paths, and they require different documents. Identify which one applies before your event, not after.

If a student paid out of pocket and is being reimbursed - an itemized **receipt** is what is required. Payment is issued directly to the student.

If the University is paying a business directly - an itemized **INVOICE** is required. Accounts Payable will not accept a document labeled "receipt" or "quote," even when it contains the same information. If the business does not normally issue invoices, ask them for one before the event rather than after.

Example: an officer buys refreshments at a grocery store and is reimbursed - receipt. The organization orders pizza for a study night and the University pays the restaurant - invoice.

The business must be registered with the University before it can be paid.

The University cannot pay a business that is not registered in Oracle. Registration is free, done by the business, and takes time - so ask early.

Before you commit to a vendor, ask them directly: **have you done business with the University of Memphis since we moved to Oracle?** If they have not, or they are unsure, send them here:

- **Doing Business with the University of Memphis:** https://www.memphis.edu/procurement/oracle/vendor.php
- **New Supplier Registration** is linked from that page
- **FAQs for Vendors:** https://www.memphis.edu/procurement/oracle/faq_vendors.php

Registration involves a validation email and a profile that University procurement staff review and activate. **If a business is not registered and does not have a supplier number, there is no way for the University to pay them** - regardless of whether your funding was approved and regardless of the documentation you provide.

A note on terminology: the Oracle system refers to these businesses as "suppliers." University procurement and Accounts Payable pages still refer to them as "vendors." They mean the same thing.

MANDATORY RSO FINANCIAL TRAINING

No RSO may submit a SOF Programming Request until the organization has completed mandatory financial training for the current academic year. This is a hard prerequisite, not a recommendation. SGA financial training is separate from the RSO training delivered by Student Leadership and Involvement - completion of one does not satisfy the other.

Format

- In-person training session conducted by Administrative Associate and/or SGA leadership
- Delivered as part of the broader RSO registration/training process overseen by Student Leadership and Involvement
- Financial training is offered each semester on the same dates as the Student Leadership and Involvement RSO training. Because RSO registration is semester-based, organizations registering in the spring complete financial training during the spring cycle.
- Law school RSOs complete their organizational registration through the Cecil C. Humphreys School of Law's separate process. That process does NOT satisfy this requirement. Any RSO seeking SGA/SAFA funding - including law school RSOs - must complete the SGA financial training administered by the Administrative Associate I before a request will be accepted or reviewed.

Required Training Content

- Overview of the single SOF Programming Request process (replacing all prior/retired terminology)
- Tier structure and submission deadlines (Tier One vs. Tier Two)
- Step-by-step TigerZone submission walkthrough
- Oracle self-submission walkthrough for student officers
- Receipt and documentation standards (see above)
- The 14-day post-event submission deadline and consequences for missing it
- The three ways to pay - University purchase on your behalf, direct vendor payment, and personal reimbursement
- Tax exemption - how to request the letter and why sales tax paid unnecessarily is not reimbursable
- Receipt versus invoice - the two payment paths and what each requires
- Vendor registration in Oracle - how to check, and why an unregistered business cannot be paid

- CES Partnership - what it covers and how it differs from a funding request. A member of the Conference and Event Services team (Damaras, Callin, or Jasmine) will attend each training session to present this portion and answer RSO questions directly
- Travel funding - how it differs and where to apply separately

Staff Advisor Role Overlap - Disclosure and Review

RSO faculty/staff advisor positions at the University of Memphis are voluntary and unpaid. As a result, University employees who hold roles in the SOF funding process may also serve as the volunteer advisor of record for a Registered Student Organization. This became more common following the disestablishment of the Office of Multicultural Affairs, when organizations previously supported by that office were reassigned to staff advisors across the division.

This overlap does not create a financial conflict of interest as defined in University Policy GE2021, and it does not disqualify an employee from either role. Consistent with the principle stated in that policy - that a potential conflict must be disclosed and evaluated rather than automatically eliminated - the following applies:

- **Written disclosure is required.** Any University employee who participates in the review, approval, compliance verification, or processing of a funding request submitted by an organization they advise must disclose that relationship in writing on the request itself, at the time the request is handled.
- **Disclosures are logged.** Each disclosure is recorded in the internal disclosure log maintained alongside the exception log.
- **The AVP for Student Engagement is the final decision-holder** on any question or challenge regarding a perceived conflict of interest in the funding process. Disclosure does not require the AVP's action; it establishes a record. The AVP acts only if a concern is raised.
- **Roles remain distinct.** An employee acting in a compliance or processing capacity applies the same standards to every organization, including one they advise. An employee acting as an advisor does not gain access to funding decisions, and may not submit funding or reimbursement requests on behalf of any organization - including one they advise.

Formal conflict-of-interest matters beyond the scope of this process are addressed through the University's Conflicts Review Committee under GE2021.

"Administrative Associate I or Designee"

Where this document refers to the "Administrative Associate I or designee," the task described may be performed by a graduate assistant or other staff member assigned by the Administrative Associate I. This applies to processing functions - Oracle entry, submission to Procurement and Accounts Payable, direct vendor payment submission, and status confirmation.

Authority does not delegate. Compliance determinations, the standing authority to return a non-compliant approved request, and extenuating-circumstances exception determinations are held by the Administrative Associate I and are not exercised by a designee. Where this document names the Administrative Associate I without "or designee," the function is not delegable.

QUESTIONS AND CONTACTS

All correspondence regarding a SOF Programming Request goes to:

sgafundingrequest@memphis.edu

This is a shared mailbox monitored by SGA leadership, the Administrative Associate I, and Student Engagement staff. Using it rather than emailing an individual means your question is seen even if one person is out, in class, or traveling.

Include your request number.

Put the TigerZone request number in the subject line or the first line of your email. Without it, answering your question requires searching by organization name and event across the full submission list, which delays the response. With it, the request is open in seconds.

Example subject line: Request #4472 - question about itemized budget

What to send to this address:

- Questions about an active or pending request
- Supplemental documentation - itemized budgets, vendor quotes, event advertisements
- Requests for clarification on eligibility before you submit

What NOT to send here:

- Funding requests themselves. These are submitted through TigerZone only
- Post-event reimbursement documentation. This is submitted through the Purchase/Funding Request in TigerZone
- Accounts Payable follow-up. Once a request reaches Accounts Payable, contact that office directly

ROLES AND RESPONSIBILITIES SUMMARY

Role	Responsibility
RSO Officer	Completes mandatory training; submits the Budget Request and Purchase/Funding Request via TigerZone; self-submits in Oracle; submits post-event documentation within 14 days. Officers are the only individuals authorized to submit funding requests on behalf of the organization.
RSO Advisor (Faculty/Staff)	Reviews and approves/denies EVENT details for compliance and appropriateness in TigerZone, separate from and prior to any funding review. Advisors do NOT submit funding requests on behalf of the organization - a funding or reimbursement request submitted by an advisor is an automatic denial and will not be reviewed. Advisors are NOT permitted to pay for student organization events out of personal funds under any circumstance.
Chair, SGA Finance Committee	Signs and issues funding decisions for SOF Programming requests following Committee review. Serves as backup signer for travel funding requests
SGA Finance Committee	Reviews and approves/denies/returns funding requests; receives notification of all exception determinations; hearing required for Tier Two; hearing optional for Tier One (either party may formally request). Standing committee of the SGA Senate; members confirmed by the Speaker of the Senate per the Senate Bylaws
Administrative Associate I (or designee, for processing functions only)	Compliance review of approved requests, with standing authority to return a non-compliant approved request to the SGA Finance Committee or RSO for correction; processes disbursement/payment in Oracle as third-party submitter; serves as comptroller/auditor ensuring University policy compliance; receives, determines, and

	logs all procedure/protocol exception requests; delivers/coordinates mandatory training; builds and maintains financial plan and forms for '26-27
Secretary of Finance (SGA)	Primary financial officer of the Association; reviews and acts on funding requests as provided in the Senate Bylaws. Signs and issues travel funding decisions, and serves as backup signer for SOF Programming decisions
AVP, Student Engagement	Procedure owner for programming, travel, and CES fund structure; final authority on cross-campus/cross-school funding questions
Senior Coordinator, Training and Development (SLI)	Serves as the primary point of contact for TigerZone, manages day-to-day RSO operations, and provides training, resources, and support to RSO officers.
Assistant Director, Student Leadership and Involvement	Serves as the all-access administrator for TigerZone, overseeing system administration and supporting RSO operations, event management, and platform functionality.
Director, Student Leadership and Involvement	Provides strategic oversight and leadership for TigerZone, RSOs, and related policies, procedures, and campus initiatives.
Partner Departments (Cost-Sharing)	In select cases, University departments have partnered with RSOs to split costs for events and conferences. This arrangement is coordinated case-by-case and does not replace or reduce the standard SOF Programming request process.

OPEN ITEMS TO CONFIRM BEFORE PUBLISHING

- [SGA ACTION ITEM] Confirm whether the speaker funding formula in the 2025-26 SOF Guidelines ($50 per estimated student attendance or $15,000 maximum, whichever is lower, plus up to 10% for lodging, transportation, and meals) carries forward for 2026-27
- CES Partnership section reviewed and confirmed by the Executive Director for Conference and Event Services, August 13, 2026. Venue scope, covered items, exclusions, billing description, philanthropy determination, and event security request responsibility all corrected per that review
- [SGA / SLI] **RSO Advisor Terms and Conditions require revision.** The advisor Terms and Conditions accepted in TigerZone were last modified October 7, 2019 and conflict with this document in two places. First, they state that advisors approve all organizational programs and activities and use of University funds by signing relevant paperwork, which advisors reasonably read as authority over funding requests; this document provides that advisors approve event details only and that a funding or reimbursement request submitted by an advisor is an automatic denial. Second, they direct advisors to assist students with Student Event Allocation, Operational Assistance, and Travel Funds, two of which are retired terminology for 2026-27. SLI owns this document. Proposed replacement language has been provided to the Senior Coordinator for Training and Development

Closed by testing, August 25, 2026

- **TigerZone form names and locations.** CLOSED. The three processes are SOF Programming Request 2026-2027, SOF Purchase / Funding Request 2026-2027, and SGA Travel Funding 2026-2027. Navigation paths are recorded at Step 1 of this document and in the companion step by step guides
- **Routing behavior.** CLOSED. Verified on all three processes. A submitted request reaches the SGA Finance Committee without staff action

- **Deadline enforcement.** CLOSED AS A FINDING, NOT AS A CONFIRMATION. The tier deadlines are unchanged and remain in force, but TigerZone does not calculate or enforce them. They are enforced at review. See System Behavior and Its Limits under Step 1

CLOSED SINCE LAST REVISION: Office title (confirmed by the Speaker of the Senate, August 5, 2026 - the office is Secretary of Finance; the 2025-26 SOF Guidelines require correction); committee naming (confirmed - SGA Finance Committee, consistent with the Senate Bylaws; the Guidelines require correction); committee decision authority (confirmed by SGA, August 11, 2026 - the Finance Committee decides, not recommends; reversal handled through the appeals process rather than a separate Senate mechanism); committee meeting cadence (confirmed by SGA, August 11, 2026 - no less than two meetings per month, additional meetings driven by volume); appeals process (established by SGA, August 11, 2026 - applies to both Programming and Travel decisions, heard by the General Assembly); Tier Two ceiling and aggregate per-organization cap (SUPERSEDED August 20, 2026 - the cap is now $7,500 per initiative with no aggregate semester or annual ceiling; tier boundaries adjusted to Tier One $1-$2,499 and Tier Two $2,500-$7,500, confirmed with the AVP and SGA President. See the Record of Decision dated August 20, 2026, which also documents a gap between the written directive and the figure implemented.); CES partnership continuation for 2026-27 (confirmed, with direct-bill change); Admin Associate standing authority at Step 3 (confirmed); extenuating-circumstances approval authority at Step 5 (approved - Admin Associate discretion with SGA Finance Committee notification); Tier One/Tier Two submission deadlines (confirmed unchanged); Student Leadership and Involvement role definitions (received from Director of SLI and added to Roles and Responsibilities); division of training topics between SLI and SGA financial training (closed - trainings are separately owned and separately delivered); law school RSO financial training requirement (clarified - Law School registration does not substitute for SGA financial training); online make-up training module (closed - not pursued; training dates are set in advance on a fixed cycle).

NEXT DOCUMENT IN THIS SERIES

This document covers the SOF Programming Request process only. The companion SGA Travel Funding Process Map is maintained separately. Three step by step submission guides accompany these maps: the SOF Programming submission guide, the SOF Purchase and Funding reconcile guide, and the SGA Travel submission guide. Supporting one page materials are the Companion Checklists, the Quick Reference, and the Frequently Asked Questions. Where any of those conflict with this document, this document governs.

Document Prepared: July 2026 | Last Revised: August 2026 | Ebony J. Sunflower, Administrative Associate I | University of Memphis Student Engagement