Funding Application Guidelines

1. **Application Submission**: All applications must be submitted by the deadlines set by the Executive Board (dates can be found on the USAC/SDI website) and are completed at least one month prior to the event.
   a. Funding applications must be completed online through the following link. Please note that incomplete applications will not be reviewed.  
      http://www.sdi.txstate.edu/Support-and-Empowerment/USAC/fundingrequest.html
   b. Events requesting funding must incorporate a social justice component and should be hosted on campus or within walking distance from campus.
   c. Applications must not contain any spelling errors

2. **Funding Hearing Set-Up**: Application will be received by the executive board and the finance chair will contact the organization to set up a funding hearing.

3. **Funding Hearing**: The person(s) attending the funding hearing should be knowledgeable about the event and able to answer any questions asked by the USAC Executive Board.
   a. It is suggested that the organization come to the funding hearing with some type of a presentation prepared to present to the USAC Executive Board.

4. **Funding Approval Process**: Following the funding hearing the board will discuss the application submitted at the funding hearing and vote on the proposed funding request.
   a. The proposal is then voted on by all five USAC Executive Board members.
   b. In the case of a tie vote, the USAC Coordinator will have the final vote on proposed funding request
   c. Member organization will be notified via email with the decision within 24 hours after the funding hearing.

5. **Purchase Procedures**: If the organization is awarded funding they must contact the Student Diversity and Inclusion Office Administrative Assistant immediately to set up shopping appointment.
   a. Please see the “Purchasing Checklist” for specific information on the purchase procedures for specific items.

6. **Post Event Evaluation Form**: The organization delegate will be responsible for electronically submitting a Post Event Evaluation Form (PEEF) two weeks within the completion of the program through: http://www.sdi.txstate.edu/Support-and-Empowerment/USAC/peef.html
Purchasing Checklist

Once your organization has been informed that it has been awarded funding, there are a number of ways you may go about purchasing food and supplies, securing event space, and arranging payments for travel and contract services. The following checklist will help you prepare for all of your purchasing needs.

The Administrative Assistant II (AAII) for The Office of Student Diversity and Inclusion (SDI) is your contact for all purchasing issues or questions:

Office Location: Office of Student Diversity and Inclusion, LBJ Student Center 5-2.2
Phone: (512) 245-2278
Fax: (512) 245-1454

First and foremost, know your allotted budget. If you exceed your budget, your organization will be responsible for any overages. The AAII will try to help you stay within in your budget, but the responsibility ultimately lies with the organizers of your event.

**IMPORTANT: New P-Card restrictions in place.**

- We can no longer purchase food, t-shirts and goods that exceed $1,000 or more, unless we have a pre-approved waiver from the purchasing office. For this reason, we will not be able to make such purchases, unless your organization gives us 2-3 weeks prior notification. Please contact the AAII to notify them in advance of food purchases or purchases that will exceed $950.00.
- We are restricted to using STAPLES online University ordering system, and can't use alternate office supply vendors (ie. Office Depot). This does not restrict you from purchasing “office supplies” from Wal-Mart, Target, etc., it only restricts you from making purchases from other office supply stores.
Purchasing Food, Paper Goods, and Supplies from Local Retail Stores:

- Schedule an appointment with the AAII to pay for your purchases by credit card one to two weeks prior to your desired purchase date ~ notify the AAII then if you intend to purchase food, otherwise you will not be permitted to. Purchase Card appointments are only to be scheduled M-F. All vendors must be inside the San Marcos city limits.

- Calculate the cost of purchases. Texas State is tax exempt; therefore, when you are shopping you need only calculate the actual cost of items.

- Complete all of your shopping prior to your scheduled appointment time. The AAII can only allow 15 minutes per appointment and they must be there to swipe the card. They are not responsible for transporting anything. Your organization must find a way to do that.

Internet Purchases:

Two weeks prior to your intended purchase date, you need to contact the AAII with the following:

- Procedure that vendor recommends for tax exempt purchases, if they do indeed calculate tax for their orders.

- Total cost including shipping

- Clear instructions as to the items being purchased (item number), the amount needed, the date by which you need them, and an address for shipping (You may opt to have items delivered to the SDI Office, but you must make arrangements to pick them up within 24 hours of delivery).

Paying Restaurants, Graphics Vendors, Off-Campus Event Space Rental, etc.:

Contact the AAII two weeks prior to the desired date of payment with the following information:

- Printed quote/invoice from vendor with exact amount to be paid and items to be paid for. You may have the vendor that you are working with fax the quote directly to the AAII at 512-245-1454, but be certain that they note the name of the event and a contact name from someone within your organization.

- Contact name (person familiar with your order)

- Phone number

- Can this purchase be paid by phone or does the credit card have to be run in person* No payments will be made until we have a typed quote or invoice outlining charges and indicating no sales tax was applied.
**IMPORTANT: New Food Purchasing Restriction**

If you plan to serve food to more than 20 people at one of your events, you must use a vendor that is on the approved caterers list. This is strictly enforced by the University. Should you make arrangements with a restaurant in town for your event that is not on the approved caterers list, we will not be able to pay for it.

Small groups of 19 or less are not held to the same restrictions. In addition, this restriction is not applicable if you are only picking up food trays from HEB or ordering pizza’s for a large group.

At this time the list is very small, but we are working with vendors in town and the University, to get more of our student’s preferred restaurants on the approved list (we do know the one’s that our students prefer to use, and are disappointed that more of them are not currently on the list). We understand that this will prove to be a problem when you are planning events, but we must follow University Policy and Procedure.

Please feel free to call the SDI Office prior to your event to see if any other caterers have been added to the approved list.

**Paying For On Campus Event Space:**

- Make your reservations as far in advance as possible. Some students book their event space 6 months in advance. Event space fills up fast at the University, and the LBJSC Ballroom is particularly hard to secure and requires reservations well in advance of the event date.

- Be certain that you request all equipment you will need at the time of the reservation, as all additional equipment will raise the total cost on your rental agreement. Determine at the time you request the event space whether you will require a podium, a projection screen, additional chairs and tables, etc.

- Present the AAII with a copy of the room reservation confirmation with total charges outlined. The AAII will need to give the Conferences Services Office an account number to pay for your space prior to your event.

**Paying for Services (DJ’s, Comedians, Speakers, Off-Campus Catering, etc.):**

**Six weeks prior to date of service** you must present the AAII with the following:

- Full and legal name, SS#, mailing address, phone number and email address of the performer/speaker you wish to contract services for.

- Total amount to be paid for services
• Contact information for any other University offices that may be donating money to cover the services and the exact amount they plan to donate

The AAII will need to send them a W-9 and a contract for services to be signed and returned one month prior to the event. If this paper work is not completed one month prior to the event, accounting will not be able to pay them in a timely manner, and it could take more than 6 weeks for a check to be cut for the services. It is our policy to have all contracts completed prior to the event date. *We cannot produce a contract after services have been performed.* If you neglect to have a contract produced prior to the event date, your organization will be responsible for payment of services

Paying for Travel:

No later than one month prior to your date of departure, you must make an appointment with the AAII to complete a travel application. You must also bring with you the following:

• A list of all students attending the event and their A ID.
• An agenda, flyer, or any other promotional material regarding the event you are attending, and event dates

***IMPORTANT NOTES PLEASE READ THOROUGHLY***

a. University funds may not be used to purchase gift cards. If you plan to purchase gift cards for your event, they will need to be purchased by your organization.
b. If you add unapproved charges to an existing approved invoice (i.e. add AV equipment to a room rental contract, add more copies to an order with duplicating services, add additional food purchases to a Chartwell’s invoice) your organization will be responsible for paying that portion of the expenses, whether you still have funds available for your event or not.
c. Post-Event Evaluation Forms (USAC PEEFs) must be completed online within 2 weeks after your event. These evaluation forms are the means by which USAC qualifies its need for funding through the University. If you do not complete the evaluation form, your organization will be suspended from submitting funding proposals for the next two semesters.
d. The SDI Office only houses USAC and MPC Funds, we do not handle Student Involvement.
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<tr>
<th>Name</th>
<th>Position</th>
<th>Office</th>
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<tr>
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