Jonsson School Career Services & Professional Development
Student Organization and Student Council Financial Policies and Procedures

This document will outline the details of Jonsson School Student Organization and ECS Student Council Funding Policies and Procedures, including receiving gifts, spending funds, and reimbursing funds.

I. Receiving and processing gifts from Sponsors for Student Organizations

a. Sponsorship Packets
b. Annual Giving Day
c. Impact Project
d. General Gifts (ie alum, employer, businesses, family members, friends, etc.)
e. Step 1: Student member that has secured gift from sponsor through a built out form with unique identifier to student organization. Development and Alumni Relations will help. You will need to secure the following:

   • Company or Organization Name
   • Company or Organization Mailing Address
   • Contact Name
   • Contact Email address
   • Gift or Sponsorship
   • Amount Giving
   • Student Organization Name
   • Student Organization Contact (if known)
   • Cost Center # if known
   • Billing if different from above

II. Requesting funds from the ECS Council Funding

a. The organization must submit the ECS Council fund Request – ECS Student Organization at least 30 days prior to the planned spending date to ensure timely processing of any approved funding.
b. The funding committee of the ECS Council will meet as needed – the meeting dates distributed to student organization leaders – to review petitions and act upon the requests. The requesting organization will be notified of the decision immediately following the meeting along with the administrative staff member who will process the distribution.
c. Organizations who submit requests may send a representative to provide insight into the rationale behind their expenditures. If the representative is a member of the Funding Committee, they must, in good faith, abstain from voting on their own organization’s funding requests.
d. The criteria used to determine eligibility for funding includes the following:
   • if the event or activity will serve the interests of the ECS student body,
   • the event’s total budget,
   • if the organization has been granted petitioned funds in the past,
   • the organization’s involvement in Jonsson School events, and
available funds to be distributed.
e. The maximum amount an organization may request is $3000 for a single event or activity; multiple requests will not be accepted. Unused funds must be returned to the variable funding pool.
f. Once approved, the chair of the funding committee will email The Jonsson School Career Services administrative staff an approved form with the exact amount.
g. The Jonsson School Career Services administrative staff will update the balance sheet for approved student organization, and funds will be available immediately for spending.

III. Requesting funds from the Student Organization Funding SOC
a. The Student Organization Center (SOC) provides two types of funding: Operating Funds and Programming Funds. Operating Funds are reimbursed at 100% not including taxes. Programming Funds are used to host programs and events on campus that are open to the UT Dallas community. There is no funding available during the summer.
b. You must go to the SOC website and follow their guidelines for funding requests: https://soc.utdallas.edu/manual/03/

IV. Spending Student Organizations funds (process of ordering)

This section will outline the process by which a student organization can spend allocated funds. If funds are not allocated on a student organization balance sheet, we are not allowed to spend funds until allocated (i.e., deposited and cleared transactionally). Please continue to check your budget with Jonsson School Career Services office as needed.

1. Student must fill out a Purchasing Form – ECS Student Organization
2. Be aware of product lead times and shipping times, and place your orders as soon as you can. To get your parts as quickly as possible, make sure to complete all the fields on the form and use as few vendors as possible (e.g., Mouser carries items from TI, Adafruit, SparkFun, and many more). Applicable quotes, PCB drawings etc. must be attached to the order requests.
3. Consider your budget and expenditures and shop for best prices. Ask if the vendor offers an education or university discount.
4. Quotes are needed for specialty equipment and other items not available online.
5. It takes time to establish accounts with new vendors. Please make sure any new vendors are located in the US and have a procedure in place for sales tax exemptions.

6. Purchasing items through a staff member using a One Card works a lot like a credit card. The card may be used for purchases of goods and services specifically related to the cardholder’s area of expertise and/or their job-related duties at The University of Texas at Dallas. Restricted Uses:
   a. Personal Expenditures, such as:
      a. Alcoholic Beverages
      b. Personal Related Expenditures (e.g., toothbrush, toothpaste, razor, shaving cream, etc.)
      c. Movie Rentals or Personal Entertainment Expenditures
d. Gasoline for Personal Vehicles

e. Personal or Family Airfare, Early Check-in Fees, Admirals Club Preferred Seating or Seat Upgrades

f. Travel-related Personal Expenditures for Family

g. Insurance

h. Amazon Prime Memberships

b. **Routine Acquisition of Business and Office Supplies** (emergency purchases of less than $5,000 permitted), such as:
   a. Paper
   b. Office and Computer Consumables
   c. Teaching Materials
   d. Commodity Lab Materials

c. **High-Risk-of-Loss Transactions**, such as:
   a. Gift Cards/Gift Certificates
   b. Cash Advances
   c. Comet Cash
   d. Pre-paid Items

d. **Capital Equipment and Controlled Assets** (unless pre-approved in writing by Purchasing), such as:
   a. Desktop and Portable Computers, Netbooks, iPads or Tablets
   b. Software ([For more details on approved software, please see: https://oit.utdallas.edu/it-purchasing/](https://oit.utdallas.edu/it-purchasing/))
   c. Firearms (e.g., hand guns or rifles), Ammunition, Explosives or Related Supplies
   d. Furniture

e. **UTD Licensed Products**, such as:
   a. Promotional Items from Suppliers **not** on the Approved Suppliers List in eProcurement
   b. Non-Promotional Items which are still UTD Licensed/Branded/ Trademarked (such as a UTD logo added to a golf cart)

f. **Scientific Supplies** (unless pre-approved in writing by Purchasing), such as:
   a. Prescription Drugs/Controlled Substances
   b. Animals/Organisms
   c. Radioactive or Hazardous Material
   d. Chemicals/Reagents (except Airgas)
   e. Lasers
   f. Chemical Fume Hoods
   g. Bio-safety Cabinets / Glove Boxes / Tissue Culture Hoods
   h. Compressed Gas Cylinder Cabinets
   i. Laboratory Refrigerators used to store any kind of chemicals

g. **Professional and Contractual Services**, such as:
   a. Consulting or Professional Services (purchase through eProcurement to ensure appropriate tax reporting)
   b. Honoraria
   c. Leases
   d. Relocation Services and Moving Companies

h. **Other One-card Prohibited Transactions include:**
   a. Airfare (purchase through UT System Concur; exceptions may be granted by Travel & One Card)
b. Amazon Purchases (purchase through eProcurement Amazon Punch-out)
c. Marketplace payments (pay using an inter-departmental transfer / IDT)
d. University Memberships, except for those on the [authorized memberships list](#)
   1. All University memberships not on the authorized list must be paid in eProcurement using a Request for Check
   2. Be cautious and make sure you have the correct membership!
   3. All memberships must include a benefit statement.

7. **Purchasing food for student organizations**
   a. Step 1: Call approved vendor to receive quote of food items you want, date, time, and location. Have them remove taxes.
   b. Step 2: Send quote and details of event to Carina@utdallas.edu within one week of event.
   c. Step 3: Carina will call or go online to pay for order at vendor and expense the funds from the student organizations account.
   d. Step 4: Student org member needs to provide the itemized receipt to Carina after event.

8. **Hack Event Purchasing Plan**

Each Hack event (organized by ECS student organizations) must submit a [Hackathon Proposal – ECS Student Organization](#)

   a. The following information is required for each Hack event:
      - Date of event
      - Link to the event website
      - Name of RUO
      - Expected attendance and virtual/hybrid/in-person (if hybrid expected attendance in both modes)
      - Prize valuations for each level of award and for specific event if possible. If we have the planned prize description and vendor this should be included
      - Specific SWAG/Prize purchasing plan acknowledgements (see HackUTD 11/21 plan for example under SWAG/Prizes
      - If shipping is involved, a section on Packaging/Shipping the SWAG/Prizes (HackUTD 11/21 plan good example)
      - Catering if applicable
      - **SERA - must be submitted within 30 days of the event and at least 10 business days prior to the event**

b. **Prizes**
   - No cash or cash equivalent (include gift certificates/gift cards) prizes may be awarded.
   - Purchase non-cash prizes from UTD approved promotional vendors or catalog contract vendors if using UTD cost center funds.
   - No prize purchases from Amazon permitted.
   - A noncash prize of less than $100 requires no documentation for tax purposes and is not taxable to the recipient.
• **U.S. Citizen/Permanent Resident Recipient:** if total value of prizes/SWAG received equals or exceeds $600 in a calendar year, UTD is required to issue a **Form 1099-MISC** (box 3, other income). A **Form W-9** will need to be obtained from the prize recipient.
  a. **NonResident Alien Recipient:** any value of $100 or greater would require a 30% gross-up in value. The **30% NRA tax withholding** would come from the cost center and should be accounted for in the event budget. Prize Recipient would need to complete **Form W-8BEN**. For example: If a NonResident Alien was a prize recipient and the value of the prize was $150, then the gross-up value would be $214.29 and tax withholding of $64.29 would be charged to the cost center against AIS funds.
  b. The value of SWAG must be combined with the value of the prize when determining the total value awarded to the recipient.
  c. The following information must be provided regarding prize recipients: Name, UTD ID# (10 digits) if applicable, recipient address, prize value, prize description, Event and placement, Form W-9 if applicable, Form W-8BEN if applicable.
  d. If Form W-9 and/or Form W-8BEN is required: preference is for the original form to be provided; however an emailed form is acceptable. The completed forms should be obtained prior to shipping the recipient the prize & SWAG.

c. All items ordered for the event (for example: t-shirts, prizes, SWAG) must be delivered to UTD before delivery to participants.

9. **Processing Reimbursement**

   a. If you purchased items from your personal funds and you would like to see if you can reimbursed please submit a **Student Reimbursement Form – ECS Student Organization**
   b. The student needs to be a current active member of the student organization.
   c. The expense should have a related business purpose to the named student organization.
   d. Student must upload the itemized paid receipts for reimbursement to the form in 9.a.
   e. Student must provide justification for the purchase and how it benefits the student organization. The reimbursement would come via direct deposit if that is what you have already set up with UTD, if not, it would come via check. As a reminder, UTD is tax exempt and does not reimburse taxes. Attached is **UTD’s tax exemption form**, you can try purchasing your items tax exempt with the form.
   f. We are restricted from purchasing from UTD approved vendors, see link below for a list of vendors. Neither Walmart nor Dollar Tree is an approved UTD vendor, therefore, I cannot make purchases from them. Any item that needs to be purchased; I have to **NOT** find it in any other UTD vendor before I can purchase
from Amazon. [https://finance.utdallas.edu/buying-goods-services/preferred-suppliers/#collapsePromotionalItems](https://finance.utdallas.edu/buying-goods-services/preferred-suppliers/#collapsePromotionalItems)

a) Students are not reimbursed sales tax (except for food during an overnight event such as a convention).

b) Gift certificates or gift cards are not reimbursed – the item needs to be tangible.

c) All SWAG must be approved and purchased directly by a UTD staff member (including t-shirts). Any SWAG purchased by a non UTD staff member will not be reimbursed.

d) For Hack events, all prizes and or food must be purchased directly by a UTD staff member. Any items not approved for purchase will not be reimbursed. Please see section V.b.

e) Amazon purchases will not be reimbursed.

10. Tracking balances of Student Organizations funds

   a. Jonsson School Career Services will be tracking the balance sheet for each student organization that will include expenses and deposits received.

   b. Please email Carina@utdallas.edu to find out updated balance of your student organization.

All forms below:

Purchasing Form – ECS Student Organization
Student Reimbursement Form – ECS Student Organization
Hackathon Proposal – ECS Student Organization
Conference Pre-Approval Form – ECS Student Organization
ECS Council fund Request – ECS Student Organization