

1. Core Principles and Financial Rules

- ASUO-Managed Funds: Only ASUO-Recognized Student Organizations can request and spend ASUO funds. All financial activity (spending, transferring, depositing) must be initiated by an authorized student officer listed in your organization's Engage roster—advisors cannot handle expenditures [1](#).
- Fiscal Year Alignment: Expenditures must fall within the fiscal year (July 1–June 30) and only for that year's activities—no “carry forward” purchases or expenses allowed [1](#).
- Purpose and Mission: Every transaction must be clearly described and directly linked to your club's mission. If the expense doesn't support the mission, it's not allowed [1](#).
- Student Benefit: Events and expenses must enhance students' cultural or physical development and be accessible to all students [1](#).
- Accountability: Regular financial education is mandatory for organization officers, including quarterly meetings. In case of overdrawn accounts, all organization fund activity will be frozen until balanced [1](#).

2. Budgeting

- Annual Process: Budget requests must be submitted through the Programs Finance Committee (PFC), approved by Student Senate, the ASUO President, and finally the UO Board of Trustees [12](#).
- Line Items: Expenditures must stick to approved activity line items. Transfers up to \$500 between lines per term can be approved internally; over \$500 requires Student Senate and ASUO Presidential approval [1](#).
- Unused Funds: Any unspent money at year-end gets swept to a surplus pool, not rolled over to your club [1](#).

3. Making Purchases & Arranging Payments

All expenditures require pre-approval and proper documentation.

A. Requesting Purchases

- Request to Purchase Goods or Services Form: Always required [1](#).
- Who Can Ask: Only registered officers in Engage can initiate.

- Needed Info: Organization & index #, line item, quote/invoice, vendor information, and supporting documentation (e.g., proof of event advertisement for food).

B. Payment Methods and Timelines

Method	Description	Turnaround
Internal Purchase Order (IPO)	UO service providers only (e.g., Catering, Print Services)	~5 days
University Purchase Order	Used with supported vendors (max \$9,999, requires receipt)	~5 days
P-Card/Electronic Purchase	Staff use org credit card for online purchases (max \$4,999)	~14 days
Service Agreement	Contracts for events/speakers—must allow 4–6 weeks	4–6 weeks
Personal Reimbursement	Strongly discouraged; itemized receipt & authorized approval	5+ days (8–10 weeks for check)

- ALWAYS get approval before making purchases, especially for personal reimbursement. Policy violations may mean you are not reimbursed at all.¹

4. Vendor Payments, Service Agreements & Contracts

- Never sign a contract as an individual! Only authorized university officials can. Student officers may initiate paperwork, but actual contracts are finalized through Student Organization Financial Support staff¹.
- Service agreements (for speakers, artists, performers, etc.) require lengthy lead time, extensive documentation, and especially clear descriptions—start this process 4–6 weeks in advance¹.
- Paying UO affiliates (students, staff, or faculty) for services is typically not allowed except in rare, preapproved scenarios requiring additional paperwork¹.

5. Reimbursements

- Last-Resort Option: Strongly discouraged, as all compliance checks (receipt detail, policy, mission-purposeness) occur after the fact.
- Receipts: Must be detailed and submitted within 30 days; reimbursement claims over 30 days old are denied.
- Approval: Must be signed off by another officer, not yourself (i.e., treasurer can't approve their own request)¹.
- Payout Schedule: Takes at least 8–10 weeks from approval for a check to be issued¹.

6. Engage Platform & Officer Duties

- Engage (Campus Labs): The official hub for updating officer rosters, submitting forms, logging events/meetings, and ensuring only active UO students handle expenditures¹.
- Responsibility: Keep the Engage roster accurate. Only officers listed in Engage can access funds or process requests³.
- Quarterly Financial Meetings: Attendance is mandatory for at least one officer¹.

7. Prohibited Purchases & Key Restrictions

- Alcohol, raffles, tobacco, cash prizes, bottled water, and capital expenses (e.g., durable/university property).
- No spending for personal gifts, employee recognitions, or honoraria.
- No restaurant dining unless preapproved for travel or special on-campus events.
- Awards, gifts, or apparel caps: \$50 per recipient¹.
- Food purchases: Must be for events open to all students and advertised in advance¹.

8. Events, Conferences, and Travel

- Events must be accessible to all UO students and advertised at least 1 week in advance if funded by ASUO¹.
- Travel: Extensive pre-planning (forms, unbiased selection, detailed itineraries, cost limits). Meal and lodging per diems are capped—contact Financial Support early¹⁴.
- Conferences/Retreats: Max \$10,000 per org per year, unless Senate and ASUO President approve more¹.

9. Fund Transfers & Surplus

- Transfers between line items or to another group require form submission and, above \$500, Senate & President approval.
- Requesting surplus funding requires justification and a formal process—consult Financial Support staff¹⁵.

Moving up:

Supplemental and Surplus Fund Requests

- ASUO Surplus Funding: Every year, unspent student organization funds from all groups at the UO roll into a central surplus pool. Recognized student organizations can apply for these surplus funds throughout the fiscal year.
- Application Process: Requests typically go to the Student Senate and require approval from both the Senate and the ASUO President. You'll need to:
 - Clearly justify why you need supplemental funding (e.g., new initiatives, unforeseen expenses, expanded programming).
 - Show detailed plans and tie requests closely to your club's mission and student benefit¹²³.
- Who Can Apply: Only official student officers listed on Engage (the roster platform) can initiate these requests.
- Start Early: Allow several weeks for review, and keep in mind that requests over certain thresholds (like line-item changes over \$500) require higher-level approvals.

2. Annual Budgeting

- Prepare for the Annual Budget Process: Your club can propose a larger budget for the next fiscal year when the budgeting season opens (usually the previous winter or early spring).
- Tie Costs to Mission: Every new line item or increase should be thoroughly justified, demonstrating direct benefit to students and alignment with your mission⁴².
- Tips: Gather data showing increased attendance, interest, or impact to support requests for more funds.

3. Fundraising and Donations

- On-Campus Fundraising: With prior approval, clubs can host fundraising events, sell merchandise, or collect donations. All fundraising activities must have pre-approval (via a form) and funds must be deposited into a university account—not handled personally.
- Tickered Events: Selling tickets for large campus events can raise funds, but must also be pre-approved and comply with ASUO ticket audit policies.
- Donations: Groups can solicit outside donations, but donors who need tax deductions must go through the UO Foundation, which takes a processing fee. All donation efforts must also be pre-approved and funds correctly deposited⁵.
- Reporting: For any fundraising event that brings in \$1,000 or more, you must file a financial report with ASUO within seven days.

4. Other Tips for Maximizing Funding

- Participate in Supplemental Funding or Grant Opportunities: Keep an eye on ASUO and university communications for grant contests or special allocations.
- Tier Advancement: Move your club up in the ASUO's tier system (by increasing involvement or programming) to unlock eligibility for larger stipends and potentially greater budgets⁶. (Some clubs get 40k+ a year off the bat and can pay their staff/exec. I think we are doing enough to climb the ladder)
- Optimize Spending to Justify Requests: Track past spending to show fiscal responsibility, and ensure your activities are fully open to all UO students.
- Consult with ASUO Finance: Meet with Student Organization Financial Support staff for advice on applications and best practices—they can help you strategize successful requests.

From our previous treasurer:

Budget approved so far for 2025-26 school year:

Administrative: \$440.00

Advertising: \$440.00

Programming: \$4,950.00

AI Workshops: \$3,840.00

Hackathons: \$1,110.00

TOTAL: \$5,930.00

This money exists in the “I-funds,” and every purchase made must somehow be related to a club event, even if it’s not directly related somehow make it related in the purchase form. Moving forward I highly recommend trying to find outsourced money as you will soon find the many hoops one must jump through to purchase anything using these funds. As time goes on and purchases are made email asuofinance@uoregon.edu for a copy of the updated ledger as there is no online reference as of now. You are not limited to this amount, there will be many opportunities to present in front of ASUO for “supplemental funds” such as for a trip etc. I highly recommend doing this and this is how we got most of our money last year, preferably do so earlier in the year as the amount ASUO will have allocated runs out over the course of the year.

Most information in regards to purchasing can be found here:

<https://sges.uoregon.edu/purchasing-guide>

Imo everything in regards to purchasing is incredibly confusing and often unorganized, you are best off going straight to the “SOFS” desk in the EMU:

<https://sges.uoregon.edu/finance>

They will be your go to for help with filling out a purchase order, moving money around to new line items, etc. Or for general club questions go in personal to the student gov office in the EMU:

<https://sges.uoregon.edu/>

If you're buying anything with club funds through ASUO, you need to fill out a **Request to Purchase Goods or Services Form**, navigate to here (if the link has not changed):

[PURCHASE FORM](#).

Only officers listed in your organization’s Engage page can submit this, email them or go to the office if you need to have this changed.

Also don't feel bad creating many purchase orders, one simple mistake and they will decline it, just edit it and resubmit until it's accepted. Most purchases will be made with the **P-Card** (think a credit card). This is used when ordering online from vendors that

accept credit cards. Someone from the Student Organization Financial Support team places the order for you, you never access the card. It takes a while depending on how busy they are, so plan ahead.

Purchases can also be made by many other ways such as an “IPO” when purchasing things through internal u of o organizations. You can also use a personal reimbursement but it's incredibly risky as they might deny it, and they reimburse you through a physical check which takes weeks to arrive.

There are unfortunately extra rules for almost every purchase depending on what it is.

Scroll down to “Additional Considerations for Purchases of Prepared Food; Groceries, Snacks, Goods; and Apparel or Branded Items” to see a list on the purchasing guide. If you're ordering food, the event must be on campus, open to all students, advertised at least seven days in advance (a flyer or social media post etc is fine), and last at least two hours.

Food also can't be purchased for general club meetings but an easy way around this is to declare them general events and just act like they are so even if they are recurring. You'll also need to submit a catering waiver if not using u of o catering. For groceries, snacks, or supplies, they must be tied to a specific event or activity.

For branded items or apparel, such as shirts etc, you'll need a recipient list with student ID numbers, and no one can receive more than \$50 worth of gear from any organization in a calendar year. Note you will likely run into more roadblocks to purchasing things as not all of the “special circumstances” are listed, this will just take time going to the SOFS desk and working it out with them; it's also incredibly hard to get electronic hardware or online services such as API credits etc. approved. This is why Maggie started IF Lab.

Best of luck, you got this!