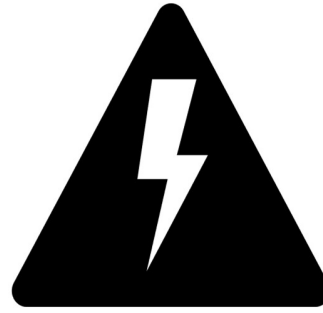


# Student Club Finance Guide

LUNDQUIST COLLEGE OF BUSINESS



Neither students nor faculty advisors have the authority to sign contracts. Contact [lcbfacsupport1@uoregon.edu](mailto:lcbfacsupport1@uoregon.edu) right away if a contract is necessary



**Risks:**  
[alcohol](#), [volunteers](#),  
[waivers of liability](#), [event insurance](#)



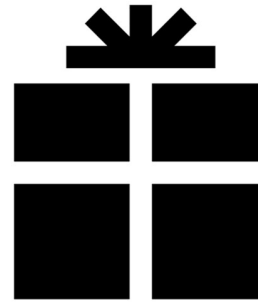
**Common university services:** [Print Services](#), [Mail Services](#), [University Catering](#), [Motor Pool](#), [Scheduling & Event Services](#), [PE & Recreation](#), [Campus Media Services](#)



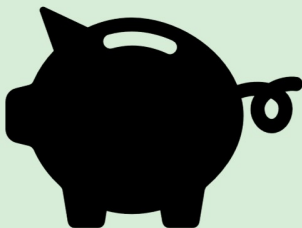
To use LCB funds, complete [Student Group Travel Request Form](#) at least 4 weeks prior to travel. [Follow ASUO process](#) 6-8 weeks in advance for using ASUO funds.



Use [UO Catering](#) & [request waivers](#) when necessary, prepackaged food vs. open food



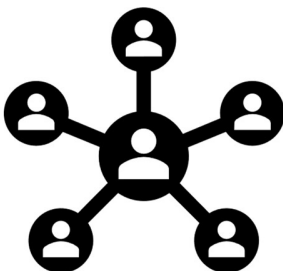
\$50 limit on awards/gifts



Contact [lcbcicc@uoregon.edu](mailto:lcbcicc@uoregon.edu) for club dues scholarships  
Complete the [Travel Reimbursement Request Form](#) to be reimbursed after a trip



**Purchases:**  
Contact the [Dean's office](#) to make purchases



#### **Important Contacts:**

Dean's Office [lcbfacsupport1@uoregon.edu](mailto:lcbfacsupport1@uoregon.edu)  
LCB Dean's Council for Inter Club Coordination [lcbcicc@uoregon.edu](mailto:lcbcicc@uoregon.edu)  
Student Organization Financial Support [asuofinance@uoregon.edu](mailto:asuofinance@uoregon.edu)  
Lundquist Events [lundquistevents@uoregon.edu](mailto:lundquistevents@uoregon.edu)

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## LCB STUDENT CLUB FINANCE GUIDE

All student clubs that have club-managed funds held by LCB must have an advisor who is a university faculty or staff member. This advisor is appointed by the college and is the individual who is authorized to approve expenditures of club funds. Club-managed funds are the property and responsibility of the college and are managed with input from the student group.

The information below draws on UO financial rules and policies. Commonly referenced sources include:

- [Financial Policies Common to ASUO-Recognized Student Organizations](#)
- [UO Business Expense Guidelines](#)
- [UO Travel Policies](#)
- [Travel: Student Travel | Business Affairs](#)

## COMMON EXPENDITURE RULES

The list below provides expenditure policies and rules which are common to student organizations. It is not a comprehensive list. If you have questions about something your club wants to do that you don't see reflected here, you can check in with the DCICC VP of Finance at [lbciccc@uoregon.edu](mailto:lbciccc@uoregon.edu).

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### ACTIVITIES CONSIDERED HIGH RISK

University policy requires a participant waiver of liability to be collected by the sponsoring organization for each participant at an activity considered high risk. [Waivers of liability](#) are required for the following activities common to student organizations: activities involving minors; recreational activities (climbing, ropes course, biking, rafting, and similar); and certain amusement activities (bounce castle, ferris wheel, water park, and similar). Any individual participating in an activity deemed high-risk must complete and file a Waiver of Liability in advance of participating.

- The Dean's Office will notify any student organization regarding an expenditure request for an activity which meets the high-risk threshold. The student organization will bear responsibility for collecting a Waiver of Liability and filing it on behalf of each attendee prior to their participation in the high-risk activity.
- For any high-risk activity with walk up participation, the sponsoring student organization will bear responsibility for ensuring a university employee is present at the event, in order that they may collect and verify each participant's Waiver of Liability.
- Many amusement-type activities (and some recreational activities) require the creation of a service agreement. See **Service agreements – contracts with a speaker, artist, performer, service provider**

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### ACTIVITIES INVOLVING VOLUNTEERS

University policy requires that any individual volunteering at a student organization-sponsored event, activity, or function complete and file a Conditions of [Volunteer Service Form](#) in advance of volunteering.

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## ALCOHOL

University funds may not be used to purchase alcoholic beverages. In addition, student organization activities which utilize university funds may not involve the use of alcohol. Foundation funds may, in limited circumstances, be used for alcohol. If you are planning on holding an on or off campus event involving alcohol, please consult with LCB's events manager for further planning to ensure risk and safety measures are considered. A Permission to Serve Alcoholic Beverages Form will be required when event organizers plan to serve alcoholic beverages on UO owned property, UO leased property, and off-premises events sponsored by the University of Oregon that are not being provided by and served by University Catering. There are some exceptions to the form, the information can be found here:

<https://safety.uoregon.edu/request-serve-alcohol>

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## AWARDS AND RECOGNITION

Taxability policies impact the use of university funds for expenditures related to awards and recognition. Awards or items of recognition require the reporting of recipient information for income tax reporting. This includes cash-equivalent awards, such as vacations, meals, lodging, event tickets, stocks, or similar items, and items/tangible personal property, such as watches, clocks, chairs, gift baskets, etc.

- Awards must be presented in a public or meaningful ceremony.
- Awards may not be used as payment for service substitution. Disguised pay is not allowable.
- Student organizations may not purchase awards or recognition items whose total value equals or exceeds \$50 per recipient. In order that an award/recognition item valued at \$50 and higher be reported as taxable income as required by law.
- University policy prevents the purchase of gift certificates and cash awards, regardless of the amount.
- College policy prevents the use of funds for the purpose of honoring current or retiring employees or their achievements.
- Flowers and plants presented as awards are not tangible personal property and are, therefore, not taxable in any circumstance.

## CAPITAL EXPENSES

Club-managed funds may not be used by student organizations for capital expenditure purchases, including but not limited to fixed assets such as property, land, buildings, business equipment, facility upgrades/construction, and gardens and intangible assets such as patents and other forms of technology without prior authorization by the college. Such purchases provide future benefits to the owner and would need to be inventoried, tracked, and maintained by the purchasing department.

See **Computers**

See **Furnishings – furniture, textiles, blinds, wall art, appliances**

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## CATERING

For the purpose of this policy, catering means any arrangement where a food service business is preparing food, bringing it to campus and setting up and or serving the food for an event. Takeout orders from restaurants and grocery stores such as pizza, sandwiches, bagels or donuts do not count as catering.

University Catering is the authorized caterer for events scheduled in university campus facilities. University Catering is established in providing additional procedures regarding operational details such as delivery, bookings, cancellations, set-up, and disposition of unused food. If you want to order catered food for an on-campus event and want to use another vendor, a catering waiver is required.

(<https://catering.uoregon.edu/waiver> ).

In addition to a catering waiver, some form of agreement or contract is required for any caterer that is not University Catering. REMINDER: Neither students nor faculty advisors have the authority to sign contracts. Contact [lcbfacsupport1@uoregon.edu](mailto:lcbfacsupport1@uoregon.edu) right away if a contract is necessary

All off-campus caterers must operate in compliance with local health department regulations. They must be able to provide proof of a valid business license for the specific operation and a certificate of liability insurance. They also need to provide their county health permit. These licensed caterers must deliver and set up the food for your campus event, unless prior approval has been granted for you to pick it up instead

See **Meals at meetings**

See **Food, snacks, refreshments, and non-alcoholic beverages**

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## CHARITABLE DONATIONS

Student organizations may not donate university funds to a charitable cause in accordance with UO policies.

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## COMMENCEMENT REGALIA

University funds may not be used to purchase graduation regalia, as that regalia becomes university property and would need to be inventoried, tracked, and maintained by the purchasing department.

Student organizations may purchase peripheral commencement gear, such as stoles, tassels, or cords, provided all other fund rules are adhered to, and the total value does not exceed the \$50 per recipient maximum.

---

## COMPUTERS

All IT equipment purchases, including computers, peripherals, projectors, and display monitors, must adhere to university procedures, regulations, and restrictions.

- LCB Technology services coordinates IT equipment purchases on behalf of student organizations who have a designated university office space in which to store such equipment. Student

organizations who do not have a designated space for them to conduct organizational activity are not eligible to purchase IT equipment.

- If your club wants to purchase IT equipment, please contact the Dean's office prior to initiating the purchase. Purchases made without prior authorization may be denied reimbursement.
- Upon receipt, IT equipment becomes university property and must be inventoried, tracked, and maintained by the college.

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## CONFERENCES, RETREATS, AND SITE VISITS

Student club managed funds may be used for conferences, retreats, and site visits, provided they enhance the cultural and physical development of students, and all other fund rules are adhered to. In addition:

- Student organizations must adhere to an unbiased selection process. Students attending a conference/retreat/site visit on behalf of their student organization must be selected during an application process open to the entire student body or to all students within a specific school or college if participation at the conference is limited to such students.
- Student organizations must report an accurate list of conference/retreat/site visit attendees.
- A detailed agenda outlining the components of the conference/retreat/site visit is required. A detailed agenda includes times, dates, location, lodging, and activities.
- LCB requires that education gained through a college-funded conference/retreat/site visit extend beyond the individual attendee(s). The sponsoring student organization must make every effort to ensure that the experience gained by the individual attendee(s) is passed on as an experience that will further the cultural and physical development of the entire student body.

## See **Travel– Transportation, Lodging, Registration Fees, Meals**

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## EVENT DEFINITION

An event is defined as a scheduled happening or occurrence at a particular time and place. An event is a planned social or public occasion such as a party, concert or meeting where not only internal but also in many cases, external parties are invited to attend.

Clubs need to have approval from their club advisor before moving forward with planning an event.

Lundquist funds can ONLY be used for an event when there is an educational objective or business purpose and is not purely just a social gathering. Routine meetings are not applicable. Events should support the mission of the club and typically have some form of structured activities or agenda. An event can be as small as 10 individuals up to 1,000 and there are many different variations of events on and off campus.

## EVENT PLANNING AND SUPPORT

The Lundquist Events and Special Projects Manager acts as a resource guide for student clubs who would like support and resources to properly plan and execute an event. Students can fill out the [Event Intake Form](#) via Smartsheet that goes directly to the events and special project manager to start the planning process. The form is required to be filled out no later than 4 weeks before the scheduled event.

Additionally, students can reach out to [lundquistevents@uoregon.edu](mailto:lundquistevents@uoregon.edu) for support. Students are



encouraged to reach out for support, especially if they have not planned an event for their club so they are aware of the resources available.

---

## FACILITY FEES AND SPACE RESERVATIONS

On-campus and off-campus facilities may be reserved by student organizations for their business activities. Budget expenditures for facility fees are allowable, provided that they enhance the cultural and physical development of students, and all other fund rules are adhered to. Space on campus can be in high demand, so please plan ahead by at least 6 weeks.

For on-campus facility information, you can visit:

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

For reservations in the Lillis complex, you can visit

<https://business.uoregon.edu/about/lillis-complex/request-room>

For off-campus facility rental information, see **Service agreements – contracts with a speaker, artist, performer, service provider**

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## FOOD, SNACKS, REFRESHMENTS, AND NON-ALCOHOLIC BEVERAGES

Student organizations may use student club-managed funds to purchase food and non-alcoholic beverages for Incidental-Fee paying students, provided the activity where the food/drink is offered enhances the cultural and physical development of attendees and is open to all LCB students. ASUO recommends, but does not require, that clubs promote an activity with food at least one week in advance via one of the following forms of publicity.

- A Campus Labs/Engage News Feed posting which promotes the activity and the fact that food is provided.
- A posting on the UO Events Calendar which promotes the activity and the fact that food is provided.
- A slide promoting the activity and the fact that food is provided which is displayed digitally on display within a UO-affiliated building.
- A poster or print advertisement which promotes the activity and the fact that food is provided and is broadly available to students.

If you would like a club activity with food promoted, please submit a request here: [Student Event or Deadline Promotion Request | Lundquist College of Business](#)

Refreshments (coffee, tea, juice, soda, fruit, cookies, pastries, chips, etc.) may be purchased with university funds for the following business-related group functions: conferences, workshops, retreats, training sessions, recruitment/orientation, and recognition/appreciation events.

- University funds may not be used to pay for refreshments for the following activities: social (non-business) activities, holidays/birthdays/weddings/anniversaries, regularly scheduled meetings, and for-class credit activities.
- Items for faculty, staff, or student personal use, such as break time coffee, tea, soda, snacks cannot be paid with university funds.

See **Meals at meetings**

See **Alcohol**

See **Restaurant dining**

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## FURNISHINGS – FURNITURE, TEXTILES, BLINDS, WALL ART, APPLIANCES

All furnishing purchases, including but not limited to furniture, appliances, wall art, blinds, and textiles, must adhere to university procedures, regulations, and restrictions. As with other student organization expenditures, the purchase of furnishings must be advantageous to the cultural and physical development of students.

- LCB building management coordinates furnishing purchases on behalf of student organizations who have a designated university office space in which to store such items. Student organizations who do not have a designated space for them to conduct organizational activity are not eligible to purchase furnishings.
  - Please note that there are designated bulletin boards for students to hang posters and any flyers/brochures must be approved by Strategic Communications. Any items displayed outside of these areas or not approved by Strategic Communications will be removed.
- Some UO buildings place restrictions on furnishing purchases and/or items requiring installation. For this reason, student organizations must obtain the written permission of the manager who oversees the building where their office space is located prior to purchasing any furnishings. Please contact the Dean's Office prior to initiating any purchase of furniture.
- Upon receipt, furnishings become university property and must be inventoried, tracked, and maintained by the college.

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## GIFTS, PRIZES, PROMOTIONAL MERCHANDISE, AND APPAREL

Taxability policies impact the use of university funds for expenditures related to gifts, prizes, promotional merchandise, and apparel. As with other student organization expenditures, the purchase of gifts, prizes, promotional merchandise, or apparel must be advantageous to the cultural and physical development of students.

- Student organizations may not purchase gifts, prizes, promotional merchandise, or apparel items whose total value equals or exceeds \$50 per recipient. A gift/prize/item valued at \$50 and higher is reported as taxable income as required by law.
- Prizes must be presented in a public or meaningful ceremony.
- Gifts/merchandise/apparel may not be used as a pay for service substitution. Disguised pay is not allowed.
- UO policy prevents the purchase of gift certificates, regardless of the amount.

- UO policy prevents the use of funds for the purpose of honoring current or retiring employees or their achievements.
- Flowers and plants presented as gifts/prizes are not tangible personal property and are, therefore, not taxable in any circumstance.

See **Awards and recognition**

---

## GOODS – EQUIPMENT, SUPPLIES, MERCHANDISE, NON-PERISHABLES

The single most common student organization expenditure is for merchandise or goods. These items are generally allowable, provided the purchase is advantageous to the cultural and physical development of students, and all other financial policies are adhered to. Please contact the Dean's Office at [lcbfacsupport1@uoregon.edu](mailto:lcbfacsupport1@uoregon.edu) to make any purchases for your club.

**Dean's office staff can facilitate student clubs making purchases using the college purchasing card or Amazon Prime account so that students will not have to pay out of pocket and be reimbursed.**

Staff in the Dean's office can assist your student organization to arrange a purchase to be picked up by your student organization at the vendor's site or to purchase the goods electronically and ship them to the LCB complex for your student organization to pick up upon delivery.

Expenditures for goods exceeding \$10,000, see **Service agreements – contracts with a speaker, artist, performer, service provider**

See **Furnishings – furniture, textiles, blinds, wall art, appliances**

See **Computers**

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## MEALS AT MEETINGS

University guidelines regulate the use of university funds to purchase food or refreshments at meetings. Purchases which meet these guidelines require an attendee list and an itemized receipt (document that itemizes what was received and the cost of each individual item). Gratuity may be paid up to 20% of the meal cost, provided a service charge has not been charged in lieu of gratuity.

- University funds can be used to pay for meals or refreshments served at trainings, workshops, appreciation events, recruitment events, and other functions where the activity meets the definition of a working meal with a documented agenda and when the function lasts at least two hours. As with all other student organization food expenditures, the function must be open to all Incidental Fee-paying students and must also be advantageous to the cultural and physical development of students.
- University funds may not be used to pay for meals or refreshments at regularly scheduled meetings.
- University funds may not be used to pay for meals or refreshments at celebrations of holidays/birthdays or in-class functions.

See **Food, snacks, refreshments, and non-alcoholic beverages**

See **Alcohol**

See **Restaurant dining**

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## MEMBERSHIPS AND DUES

Fees or dues for professional organizations must have a valid and documented business purpose which links the mission of the student organization to the professional organization. Individual membership fees or dues must be applicable to the student leader's current position. In order to maintain relevance and in adherence with UO policy, the time period covered by the membership fees or dues is limited to one year.

Lundquist College majors and minors with financial need and in good academic standing may apply for a scholarship to cover the cost of annual dues for their membership in one Lundquist-affiliated club. Please contact DCICC for more information about the club dues scholarship.

Airline club memberships are personal memberships, and student organization activity does not meet the requirements for use of university funds for this purpose.

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## MOBILE TECHNOLOGY

Mobile technology is a collective term used to describe various types of cellular communication technology including cellular phones, smart phones, personal digital assistants, tablets, and other similar devices. Use of university funds for mobile technology is not an allowable expense.

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## ON-CAMPUS SERVICES – UNIVERSITY SCHEDULING AND EVENT SERVICES, MOTOR POOL, CAMPUS COPY

Student organizations may utilize university department-based service providers for services of relevance to their student organization's business activity. In some cases, such as catering and printing, University policy requires the use of these on-campus service providers. Commonly utilized providers include:

[University Scheduling and Event Services](#)

[University Print Services](#)

[University Catering](#)

[Motor Pool](#)

[Transportation Services](#)

[PE and Recreation](#)

[Campus Media Services](#)

Student organizations should obtain a price quote or cost estimate and provide this information to their faculty advisor for approval prior to confirming services.

See **Facility fees and space reservations**

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## PAYING A UO-AFFILIATE – FACULTY, STAFF, STUDENT, GRADUATE EMPLOYEE

University policy allows for the use of university funds to pay faculty, staff, and students for services they perform under certain circumstances. Student organizations who pay UO Affiliates are often doing so in exchange for their services as a speaker, performer, photographer/videographer, or DJ. Regardless of the service provided, paying a UO-Affiliate is complex and requires strict adherence to human resources policies, employment rules/laws, and financial policies.

- **Current or recent UO students and employees cannot be paid as independent contractors and must be paid as employees.**
- Pay to a UO-Affiliate must be authorized in advance by the club coordinator and the Dean's office.
- All authorized payments will be processed through the University Payroll System.
- Hourly pay is subject to wage standards. Contact Keith Dussell to learn more about standard rates of pay for students hired to conduct commonly performed services.
- Student employees have a firm 20 hour/week employment cap. Any hours served by a student in service to a student organization will count toward that student's weekly/monthly maximum.
- Ethics rules prevent student organizations from paying a family member, friend, or member of the student organization for services provided to your organization.
- Graduate employees (GEs) have an existing employment contract with the university and may be negatively impacted by the creation of a supplemental employment agreement. These individuals should discuss their individual situation with their employer in advance of agreement to provide a service.
- Faculty, staff, and other professional employees each have university employment contracts specific to their positions. Some contracts include limits on supplemental pay. In many employment situations, faculty and staff members are expected to share their expertise and knowledge with students outside of their primary role without additional compensation for doing so.
  - University policy restricts the use of university funds to supplement the pay of a faculty or staff member for conducting endeavors of relevance to the scope of their position. It is never permissible to pay a faculty or staff member for a service they provide to a student organization which is related to their role or expertise as a faculty or staff member.
  - If a faculty or staff member is providing services outside of the scope of their employee agreement, it may be possible to compensate them. The criterion for doing so is very narrow and must be vetted well in advance of service. Please contact Dean's office for guidance.

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## PRINTING, PUBLISHING, AND MAILING

University policy specifies that [Printing and Mailing Services](#) is the first-choice source to perform printing, copying, and mailing services for university business. Student organizations should inquire at Printing and Mailing before they approach other vendors. Printing and Mailing Services provides the following services

common to student organizations: stationery, including business cards; bulk mailing services; brochures/posters/flyers/banners; and custom printing including folding, binding, and similar. If Printing and Mailing cannot provide the service required or deliver on the required timeline, an exception can be made.

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## RECEIPTS

University policy specifies criteria for what constitutes a valid receipt. In general, the documentation must answer questions regarding who, what, when, where, and why the transaction occurred. Screenshots of apps and copies of bank or credit card statements are not acceptable receipts in most circumstances.

See **More Information on Receipts & Examples**

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## RESTAURANT DINING

UO expenditure policy prevents the use of university funds for personal dining on-site at a restaurant or other food venues. This restriction does not apply to purchases at restaurants or catering at an event open to all students or if the student organization is attending an off-campus retreat/conference/site visit on university business.

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## SERVICE AGREEMENTS – CONTRACTS WITH A SPEAKER, ARTIST, PERFORMER, SERVICE PROVIDER

University policy requires the creation of a legally binding agreement in situations where university funds are being exchanged for the service(s) of a vendor outside the university. Student organizations commonly utilize service agreements when they pay a speaker, artist, performer, rental agency, or other service provider for services provided to their student organization.

- Service agreements are legally binding contracts. The Dean's office assists student organizations who wish to create a service agreement on behalf of their organization. All service agreements paid for using university funds will name the University of Oregon as the party representing your student organization, not the student organization itself.
- **Under no circumstance may a student sign any agreement with an outside vendor on behalf of their student organization. Students do not have authority to enter into service agreements on behalf of the university. Faculty advisors are also not permitted to sign agreements on behalf of the university.**
- Because a service agreement is legally binding, it requires extensive communication and advance planning. Student organizations should contact the Dean's office at least six weeks prior to the date the service would occur.
- Ethics rules prevent student organizations from paying a family member, friend, or member of the student organization for services provided to your organization.
- University policy prohibits the creation of a service agreement with any individual who has had an affiliation with the University of Oregon in the past two years. This includes university students, GEs, faculty, staff, post docs, and temporary/courtesy appointees. For information about paying a UO

student, GE, faculty, or staff member, see **Paying a UO-affiliate – faculty, staff, student, graduate employee**

Service agreements are coordinated through the Dean's office. Student organization-sponsored service agreements include a fixed fee paid to a provider which covers the costs of the services provided as well as any negotiated expenses such as travel, lodging, and meals.

Rental agreements should include a fixed amount which covers all charges and fees. In adherence with UO policy, the maximum time period for a facility rental is limited to one year.

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## SOFTWARE AND SERVICES

All software and IT services purchases, including computer programs/applications, utilities, enhancements (e.g., fonts, drivers), web-hosting, and operating systems must adhere to university procedures, regulations, and restrictions.

- LCB Technology Services coordinates software purchases on behalf of student organizations who have a university-owned computer in their designated university office space. Student organizations who do not have a designated space for them to conduct organizational activity are not eligible to purchase software for their personal computer device(s).
- The purchase of services, including web-hosting software, is allowable, provided there is a valid and documented business purpose which links the mission of the student organization to the software or service. See **Subscriptions**. See **Service agreements – contracts with a speaker, artist, performer, service provider**
- **Student organizations who purchase web hosting or domain registration should contact the Dean's office regarding administrative logins and payment with the college purchasing card.**
- Upon receipt, software becomes university property and must be inventoried, tracked, and maintained by the college.

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## STIPENDS

Officer positions with LCB Student Organizations offer students learning and leadership development opportunities. The general college policy is that these are voluntary positions and not compensated. If you believe there is a reason why officer roles in your organization should receive an exception to this policy, please contact the Dean's office.

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## SUBSCRIPTIONS

Subscriptions must have a valid and documented business purpose which links the mission of the student organization to the subscription. Physical subscriptions (e.g., magazines) must be delivered to the student organization's university office space. To maintain relevance and in adherence with UO policy, the time period covered by the subscription is limited to one year.

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## TOBACCO & CANNABIS

UO policy prevents student club funds from being used for tobacco or cannabis products.

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## TRAVEL

Student organizations may use student club-managed funds for travel with a clear business purpose linked to the organization's mission, provided they are from an appropriate activity line item, they enhance the cultural and physical development of students, and all other expenditure rules are adhered to.

**If your club is planning to use funds from Lundquist, not ASUO, please complete [this Travel Request Form](#). If you are using ASUO funds, follow the processes on the ASUO website: [Travel and Lodging | Student Government Engagement and Success](#).**

Please see Error! Reference source not found. following this section for more detail on steps to follow in arranging travel. The following additional policies apply to travel:

- Conference, site visit, and retreat attendees must be selected through an unbiased application process open to the entire student body, except for conferences limited to participants from a specific school, college, or subpopulation, in which case attendees must be selected through an unbiased application process open to all members of the sub-population.
- LCB Rules specify that student organization leaders must make every effort to ensure that the experience gained by the individual attendees can be passed on as an experience that will further the physical and cultural development of the entire student body.
- Travel activities paid for with university funds are considered university activities. Travelers will be held responsible for adherence to the [Student Code of Conduct](#).
- In addition to a clear business purpose, student organizations wishing to travel for the purpose of a retreat must provide documentation which details each of the specific activities that will be conducted at the retreat, the activity duration, and the dates and location where the activities will occur.
- Planning is required. Submit [requests for travel](#) at least **four weeks** in advance of departure date.
- For chartered transportation and expenditures for travel exceeding \$10,000, see **Service agreements – contracts with a speaker, artist, performer, service provider**

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## TRANSPORTATION

- [Submit requests](#) for airfare or train/shuttle reservations, complete with a final list of attendees, at least **four weeks** in advance of departure date.
- Shuttle or motor coach or other vehicle rental requests should be submitted at least **four weeks** in advance.
- Contact the Dean's Office to reserve any vehicles through Motor Pool. Students are not authorized to submit rental requests but may operate motor pool vehicles if they meet driver eligibility requirements.
- All motor pool operators must be listed as drivers on rental request and be certified through the University of Oregon Driver Certification process prior to operating any Motor Pool vehicle. To operate a van, drivers must also complete the required van training.



- Reservations for Motor Pool vehicle rentals must be submitted at least **five weeks** before the departure date, as they book up quickly. Motor Pool can also make reservations up to one year in advance
- All student organization vehicle travel requires a driver's license and [driver certification](#). This is true for use of personal vehicles, rental vehicles, and vehicles from University Motor Pool. [Vehicle travel involving vans requires an additional certification](#).
- Under no circumstances may vehicles rented to conduct student organization business be used for personal purposes.

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## LODGING

- A [Travel Request](#)—complete with a final list of attendees—must be submitted **four weeks** in advance of departure date.
- Lodging expenditures require adherence to university travel policies, including [per diem rate caps](#).
- Students should not pay the lodging costs for other students. Either the college can reserve the room block directly, or individual students can pay their own costs and be reimbursed.
- The number of individuals attending may not exceed the published capacity of the overnight accommodation.
- Overnight stays on university business to a vacation home, such as an Airbnb, Vrbo, Vacasa, or similar rental home, are prohibited.

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## REGISTRATION FEES

- Contact the Dean's office if your group is travelling to an event with registration fees so they can be paid with the college purchasing card.
  - Be mindful of deadlines and be prepared with a complete list of attendees.
- Some conferences offer add-on activities, unrelated to the educational objective of the conference, which may not be paid for with university funds.

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## MEALS

- Meals may be reimbursed to students after the trip at [per diem rates](#), subject to approval from the budgetary authority for the student group.
- During one-day trips, university funds may not generally be used for meals, except in situations where the business purpose of the day trip includes the meal and when one person pays for all attendee meals, retains itemized receipt, and seeks reimbursement with a list of attendees and in adherence to expenditure rules.

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## REQUESTING TRAVEL-RELATED REIMBURSEMENTS

Student organization travelers may claim reimbursement for miscellaneous expenses and meals purchased during their trip if:

1. The expenses are allowable under university travel guidelines
2. The expenditures are approved by the student organization
3. Funds are sufficient within the designated line item of the student organization's budget.

Students may request reimbursement for their travel expenses after the trip using [this form](#).

Reimbursement requests will be subject to the approval of the budgetary authority for their club and compliance with UO travel policy.

Most incidental purchases—food, tickets, shuttle fees—are subject to very specific travel policies. For more information about university travel policies, contact the Dean's Office.

Travel reimbursement policies common to student organizations include:

- Original itemized receipts are required.
- University travel policies, including per diem rate caps, must be adhered to.
- Reimbursements must be requested within 30 days of travel conclusion.
- Airfare should be purchased through a UO-affiliated travel agency with assistance from the Dean's office [via a travel request](#).
  - If students will pay for airfare out-of-pocket and seek reimbursement from LCB club funds, this must be noted in the travel request submitted to the Dean's office.
- Reimbursements for meal expenditures may not exceed the published [per diem meal caps](#) and must also adhere to time and distance thresholds outlined in university policy. Ask the Dean's office for more information.
- Meal expenses cannot be reimbursed if they are also provided as part of a conference.
- If a traveler stays at a hotel which provides breakfast, costs associated with breakfast are not reimbursable.
- Travelers should not pay for another traveler's meal(s) because policies do not allow one individual to be reimbursed for more than one per diem.
- Reimbursements for mileage, fuel and other vehicle expenditures require driver certification and the filing of a [Personal Vehicle Use Form](#) before departure and are subject to the IRS reimbursement rate.
- Reimbursements for lodging expenditures may not exceed the [published overnight rate caps](#) and require original folio receipt. Lodging caps vary by location; ask the Dean's office for more information.
- Have fun on your trip, but add-on activities, such as event tickets, concerts, sporting events, zip-lines, mini-golf, etc., are not eligible expenses

## TRAVEL PROCEDURES COMMON TO STUDENT ORGANIZATIONS

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### HOW TO MEET THE UNIVERSITY'S DRIVER CERTIFICATION REQUIREMENTS

All student organization vehicle travel requires a licensed driver who is also driver certified by the University of Oregon. This is true for use of personal vehicles, rental vehicles, and vehicles from University Motor Pool.

If the driver is driving a van (owned, rented, or borrowed) for university travel, they must also obtain van certification.

The university's [driver certification process](#) allows drivers to self-certify, upon an endorsement from LCB.

- Driver certification and driver authorization must be renewed each academic year. Any previous student-held driver certification expires on August 30. Students must re-apply in order to maintain their certification.
- Van certification is also required each academic year. Students who wish to drive vans for university business must watch and pass the van safety test annually.
- Proof of driver certification (and confirmation of van certification, if applicable) must be provided prior to departure.

How to become driver certified and meet university driving requirements:

1. Each driver review the university's [minimum driver and driving requirements](#) to verify their eligibility before proceeding.
2. Driver completes an online [Driver Certification Form](#).
3. If vans are to be utilized, the driver must also obtain van certification. Van certification is required for anyone driving a van (owned, rented, or borrowed) for university-approved travel. To be certified, an individual must pass the [online van training course](#), provided by University Motor Pool. The van safety video is approximately 37 minutes in length, and drivers should allow at least 45 minutes to watch the video and take the test. Confirmation of van certification will be emailed to each driver upon successful completion of test.

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## HOW TO RENT A UNIVERSITY-OWNED VEHICLE

The university motor pool reservation process requires coordination between the traveler, the student organization driver(s), the Dean's office, and University Motor Pool. A student organization's motor pool reservation will not be finalized until Dean's office confirms funds are available. To arrange, please complete a [travel request](#) at least five weeks prior to departure date.

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## HOW TO RENT A VEHICLE THROUGH ENTERPRISE CAR RENTAL

The university has a corporate account with Enterprise/National Car Rental, which ensures insurance coverage and may allow for discounted rental rates. In addition, the university's contract with these vendors allows underage drivers aged 18 and older without adding a minimum age surcharge. To arrange, please complete a [travel request](#) at least four weeks prior to departure date.

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## HOW TO USE A PERSONAL VEHICLE FOR UNIVERSITY BUSINESS TRAVEL

University policies allow travelers to use a personal vehicle for university-approved business travel, provided they have personal automobile liability insurance as the primary coverage for any accidents

involving that vehicle. University-provided automobile liability coverage will apply on a limited basis after the traveler's primary coverage limits have been exhausted.

To request the use of a privately-owned vehicle for university business travel:

1. Driver(s) must provide a signed [Personal Vehicle Use Form](#) to the Dean's office at least **two weeks** in advance of departure. The Dean's office will complete the approval section of this form.
2. Driver(s) must provide proof of Driver Certification (and Van Certification, if applicable) to the Dean's office at least **two weeks** in advance of departure.
3. Reimbursements at the IRS published reimbursement rate for fuel must be requested **within 30 days** of completion of travel by submitting the [Travel Reimbursement Form](#).

## MORE INFORMATION ON RECEIPTS & EXAMPLES

### Information required for acceptable receipts

**\*\*Screen shots from phones are not good receipts\*\***

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#### AIRFARE RECEIPT

- Name of person flying
- Ticket number
- Pricing information and showing it is paid
- Detailed itinerary

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#### HOTEL RECEIPT

- Name of person
- Detail of stay
- Pricing with zero balance owed

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#### AMTRAK RECEIPT

- Sales receipt that shows ticket number, passenger name, detailed trip info (departure times, dates, coach or business class) and payment method

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#### TAXIS, LYFT, UBER RECEIPTS

- Name of person traveling
- Detailed pricing with payment info
- Only 20% tip allowed

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#### RESTAURANT RECEIPTS

- Name of Restaurant printed on receipt

- Most sit-down restaurants have two copies, we need both
  1. “Itemized copy” of what was purchased
  2. “Customer copy” (the part you sign and add tip) that shows payment method
- Only 20% tip can be reimbursed
- Alcohol should not be included

Example of good receipt.

Reimbursement to:



**WILD DUCK CAFE**

1419 Villard St  
Eugene, OR 97403  
(541) 485-3825  
WildDuckCafe.net

Payment  
Copy

10/19/21, 1:14 PM Ticket: W11  
Server: Melissa M  
DINING ROOM Table 12  
Seat 1  
Invoice: 211029-07-11

Credit Sale  
Status: Approved  
Card Type: VISA  
Card Number: XXXXXXXXXXXX4173  
Card Owner:  
Entry Method: Chip  
Auth Code: 03692C  
APPLAD: VISA CREDIT  
AID: A0000000031010  
TC: 8F8AFFD98AE5689D

AMOUNT		88.75
TIP	15% 13.31	18
TOTAL	102.06	106.75

Sign X

I agree to pay the total amount above  
according to the card issuer agreement



**WILD DUCK CAFE**

1419 Villard St  
Eugene, OR 97403  
(541) 485-3825  
WildDuckCafe.net

Detailed  
Copy

10/29/21, 1:14 PM Ticket: W11  
Server: Melissa M  
DINING ROOM Table 12  
Seat 1  
Invoice: 211029-07-11

1 ICED TEA	3.00
1 TURKEY REUBEN SANDWICH	15.50
SUB SWEET FRY	
3 STEAK & FRY	55.50
1 DUCK BASKET	14.75
Subtotal	88.75
Total	88.75

Suggested Tips  
18%=15.98 20%=17.75 22%=19.53



04-02-22

<b>John Faculty</b>	Folio No. :	Room No. :	0315
<b>288 Somewhere St.</b>	A/R Number :	Arrival :	03-31-22
<b>Eugene OR 97402</b>	Group Code :	Departure :	04-02-22
<b>United States</b>	Company :	Conf. No. :	660308733
	Membership No. :	Rate Code :	BAR
	Invoice No. :	Page No. :	1 of 1

Date	Description	Charges	Credits
03-31-22	*Room Charge	120.00	
03-31-22	Sales Tax	11.09	
03-31-22	Occupancy Tax	8.70	
04-01-22	*Room Charge	140.00	
04-01-22	Sales Tax	12.93	
04-01-22	Occupancy Tax	10.15	
04-02-22	Visa		302.87
<b>Total</b>		<b>302.87</b>	<b>302.87</b>
<b>Balance</b>		<b>0.00</b>	

**Guest Signature:**

I have received the goods and / or services in the amount shown hereon. I agree that my liability for this bill is not waived and agree to be held personally liable in the event that the indicated person, company, or associate fails to pay for any part or the full amount of these charges. If a credit card charge, I further agree to perform the obligations set forth in the cardholder's agreement with the issuer.

Zero balance

Clayton Plaza Hotel St. Louis  
7750 Carondelet Avenue  
St. Louis, MO 63105  
Phone: 314-728-5400 Fax: 314-719-1126

From: [etickets@amtrak.com](mailto:etickets@amtrak.com) <[etickets@amtrak.com](mailto:etickets@amtrak.com)>  
Sent: Wednesday, April 6, 2022 9:31 PM  
To: Joe Faculty<[uoregon.edu](mailto:uoregon.edu)>  
Subject: Amtrak: eTicket and Receipt for Your 04/07/2022 Trip – JOE FACULTY

**SALES RECEIPT**

Purchased: 04/06/2022 9:31 PM PTThank you for your purchase.

1. Retain this receipt for your records.
2. Print the attached eTicket and carry during your trip.

1 Massachusetts Ave NWWashington, DC 20001800-USA-RAILAmtrak.com

**Reservation Number - 087905**Eugene, OR - Amtrak Station to Portland, OR - Union Station (Round-Trip)  
APRIL 6, 2022  
**Billing Information**

Apple Pay (Purchase)  
Visa ending in XXXX

Total \$90

**Purchase Summary - Ticket Number 0960694606851**

<b>TRAIN 508: Eugene, OR - Amtrak Station to Portland, OR - Union Station (Round-Trip)</b> Depart 4:30 PM, Thursday, April 7, 2022	
1 ADULT RAIL FARE	\$29.00
1 BUSINESS CLASS SEAT	\$16.00
Ticket Terms & Conditions CANCELLATION FEE MAY APPLY.	
	<b>Subtotal</b>
	<b>\$45.00</b>
<b>TRAIN 505: Portland, OR - Union Station to Eugene, OR - Amtrak Station (Round-Trip)</b> Depart 6:10 PM, Friday, April 8, 2022	
1 ADULT RAIL FARE	\$29.00
1 BUSINESS CLASS SEAT	\$16.00
Ticket Terms & Conditions CANCELLATION FEE MAY APPLY.	
	<b>Subtotal</b>
	<b>\$45.00</b>
<b>Total Charged by Amtrak</b>	
	<b>\$90.00</b>

**Passengers**

JOE FACULTY

**Important Information**

- Tickets are non-transferable.
- Changes to your itinerary may affect your fare. Refund and exchange restrictions and penalties for failure to cancel unwanted travel may apply. If your travel plans change, contact us before departure to change your reservation. If you do not board your train, your entire reservation from that point will be canceled. If you board a different train without notifying us, you will have to pay for it separately; the conductor cannot apply the money paid for your prior reservation. For more information please visit [Amtrak.com/changes](https://www.amtrak.com/changes).
- Summary of Terms and Conditions: Ticket valid for carriage or refund (subject to the refund rules of the fare purchased) for twelve months after day of issue unless otherwise specified. Amtrak tickets may only be sold or issued by Amtrak or an authorized travel agent/tour operator. Tickets sold or issued by an unauthorized third party will be voided by Amtrak. This ticket is a contract of carriage which includes specific terms and conditions and a binding arbitration agreement between Amtrak and the ticket holder. The terms and conditions and arbitration agreement are available at [Amtrak.com/terms-and-conditions.html](https://www.amtrak.com/terms-and-conditions.html). Tickets sold for non-Amtrak service are subject to the tariffs of the providing carrier.
- Questions? Contact us online at [Amtrak.com/contact](https://www.amtrak.com/contact) or call 1-800-USA-RAIL (1-800-872-7245) or for text telephone (TTY) 1-800-523-6590.



**Your ride with Tate on March 29**

1 message

**Lyft Receipts** <no-reply@lyftmail.com>  
To: Joefaculty@gmail.com

Tue, Mar 29, 2022 at 6:40 PM



MARCH 29, 2022 AT 5:39 PM

## Thanks for riding with Tate!



100% of tips go to drivers. [Add a tip](#)

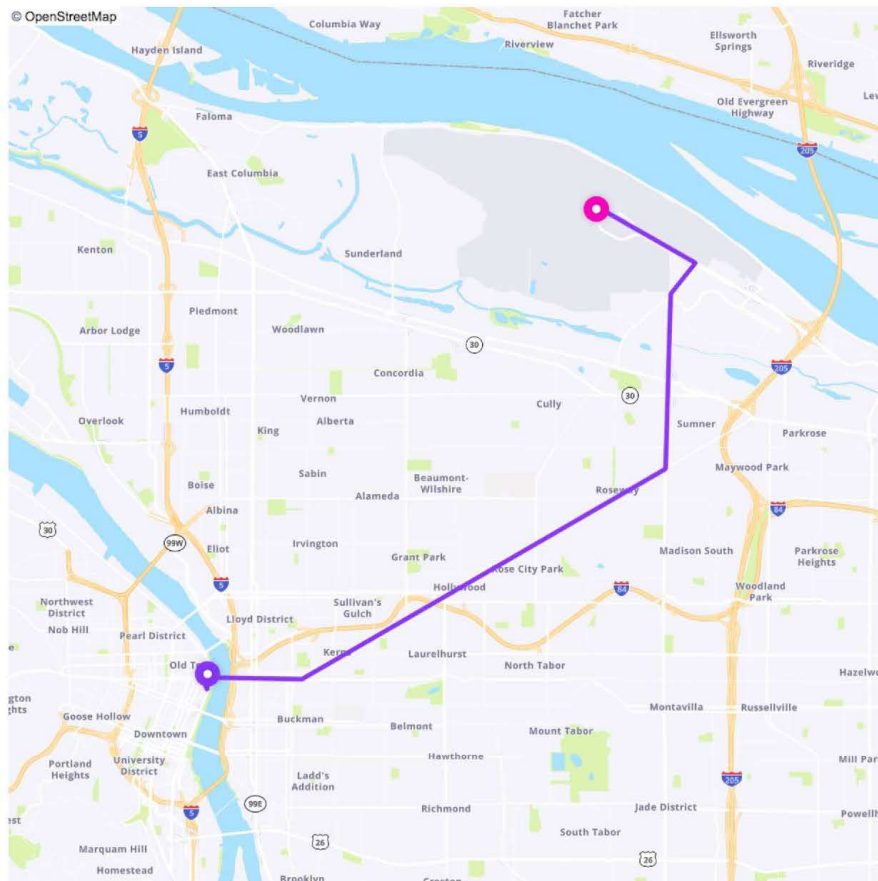
Lyft fare (8.68mi, 31m 50s)	\$43.72
Priority Pickup Upgrade	\$7.13
Fuel Surcharge	\$0.55
City Of Portland Surcharge	\$0.50



PayPal account

**\$51.90**

If adding tip, only 20% is reimbursable.



- **Pickup** 5:39 PM  
38 NW Davis St, Portland, OR
- **Drop-off** 6:11 PM  
7000 NE Airport Way Portland, OR