MD Student Organizations

2025-2026

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Welcome!

Today's Agenda:

- Student Services
- What are RSO's?
- Purchase Request Forms (PRF's)
- Budget & Funding
- Vendors
- Student Org. Website & Webcourses

UCF

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Student Services

Dr. Smith,
Assistant Dean
for Students

Andrew Quigley,
Assistant
Director

Brooke
Vercheski,
Coordinator

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What are RSO's?

UCF Main Campus
(650+ Registered Student
Organizations)

UCF COM M.D. Program
Student Organizations
(known as *recognized*
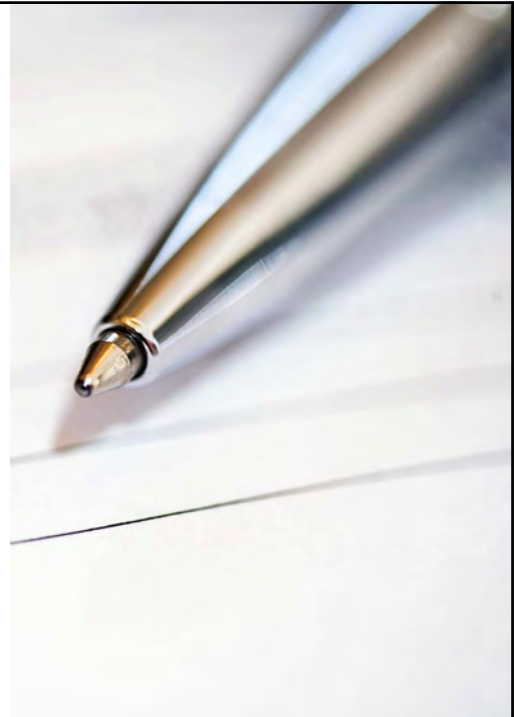student organizations)

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Recognized Student Organizations

Must have the following:

- Constitution
- Leadership board
- Active member list/Email listserv
- Active Advisor/faculty affiliated with UCF

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Purchase Request Form (PRF)

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Purchase Request Form (PRF)

- Purchase Request Form should be submitted to the event request form or M2 class treasuer:
  - If the student organization wants to order, beverages & food, supplies, items, etc. for an event.
  - Invoices
    - For online orders this would be a screenshot of your cart, word document with links or Amazon Wish List PLUS quantities for each item to be ordered
    - For Publix orders this is the invoice given to you by the Apron's Event Planners
    - For a food vendor this is a pre-receipt or order invoice which indicates the order is for <u>a future date</u>
  - Event/Meeting flyer
    - **Must include** the SGA logo, time, date, title, and location
    - Can be a basic word document for PRF purposes if the official flyer hasn't been finalized yet
- For items purchased through a PRF, **we cannot get you a reimbursement**! Please don't pay for anything out of pocket hoping to be reimbursed!

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Only this section

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Slide 13

Legacy Department (People Soft #)	
Fund	FD880 ASF
Program	PGA1 Campus Events/Orgs
Gift (ID is the same as Foundation number)	
Division	D265 SDES

Supplier Phone Number	
Supplier Email	
Supplier Address	
Has the supplier been added to WorkDay?	Yes ✓ No ☐ If No, the supplier must go to the Prospective Supplier Portal
State Contract?	Yes ☐ No ☐ Don't Know ✓
State Contract Number and Expiration Date	

PURCHASE DETAILS

Item Description	Product/SKU/ UPC	Quantity	Price	Total
Mifflin-USA Card Protector (4x3 Inch, Clear, Bulk 250 Pack) Quick Load Horizontal No 2		2	$ 39.98	$ 79.96
Avery Customizable Name Badge Inserts, 3" x 4", White, 300 Printable Name Tag Inse		2	$ 13.72	$ 27.44
Marspark Lanyards Bulk with Clip Flat Neck Lanyard Badge Lanyard with Swivel Hook		1	$ 16.99	$ 16.99
Marspark Lanyards Bulk with Clip Flat Neck Lanyard Badge Lanyard with Swivel Hook L		1	$ 26.79	$ 26.76
				$ 0.00
				$ 0.00
				$ 0.00
			ORDER TOTAL	$ 151.15

QUOTE THRESHOLD

Under $10k ○ $10,000.01-$35k (2 informal quotes) ○ $35,000.01-$75k (3 formal quotes) ○ $75,000.01k and up ○ (Requires formal bid process)

Exemption ○   Sole Source ○   Invitational to Bid (ITB) ○

Quote 1 - Supplier Name		Quote Amount	

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Slide 14

The Complete Packet
(A Visual Guide)

The Invoice
Three examples below: Publix, Amazon and Papa Johns

The Flyer
Two examples of fliers: basic flyer with info and logo or the final flyer – either for the packet is fine!

① The PRF

② ③

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PRF Best Practices

- Submit the current year's PRF form
- Order from commonly used vendors
  - Do obtain and submit final receipts for orders
- Let Student Services know if an event is cancelled (especially with a food order!)
- Consider joint meetings or events to save on costs
- * Complete the Financial Training available for all students interested - https://asf.sdes.ucf.edu/training/ (but required for Treasurers) *

- Any kind of food delivery or take out you **must** get the receipt and email/drop it off in the Student Affairs office
  - Please drop off as soon as possible!
- If delivery, provide your name & organization
  - COM has many people on campus! Delivery drivers & Welcome Desk staff don't know everyone
- Add tip to your order total and PRF if you wish!
- When submitting an PRF for items, do include the quantities of the items along with the links

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Worst Practices

- Using an older form
- Unlocking the intentionally locked fields on the form
- Submitting an incomplete packet
- Leave out pertinent information (time, date, location)
- Don't send them to main campus – send to the M2 Student Council   Treasurer
- Don't split payments – UCF does not pay deposits

- Don't purchase gift cards, cash equivalents, or raffle items (not allowed with SGA dollars)
- Don't change your meeting date without changing your food order (if PRF already submitted)
- Don't sign contracts with vendors for goods or services
- Don't charge admission or registration fees to students for student events funded by A&SF dollars
  - May be open for suggested donations
- Don't host homemade bake sales
- Don't pay for anything with your own money (you CANNOT be reimbursed from this funding)
- Don't use for membership dues
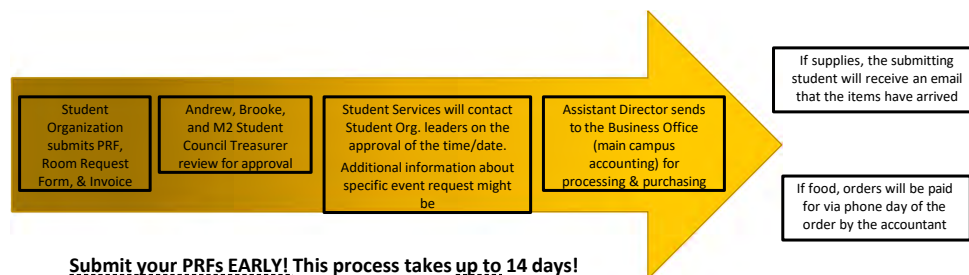- Don't use for donations or for items purchased for donation

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Important things to note for PRF orders

- If ordering beverages from Publix, must be Coca-Cola products only. UCF has a sponsorship/agreement with the Coca-Cola company.
  - https://www.coca-colacompany.com/brands
  - If you order a non-Coca-Cola item that Coke carries, Accounting will simply not pay for that item
- All food orders are paid <u>day of</u> the event/order over the phone with a credit card by our main campus accountant (they are not located at COM)
  - The earliest a food order may be paid for is the week of an event – at request
- For all items ordered, we will email you that your package has arrived
  - A student from the group must come to pick up your items from Student Affairs
  - If your items require storage, may request the student organization closet badge to gain access to store your items until your event

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The PRF Process

| Student Organization submits PRF, Room Request Form, & Invoice | Andrew, Brooke, and M2 Student Council Treasurer review for approval | Student Services will contact Student Org. leaders on the approval of the time/date. Additional information about specific event request might be | Assistant Director sends to the Business Office (main campus accounting) for processing & purchasing |

If supplies, the submitting student will receive an email that the items have arrived

If food, orders will be paid for via phone day of the order by the accountant

<u>Submit your PRFs EARLY!</u> This process takes <u>up to</u> 14 days!

Please be mindful of your timing (especially during M2 exam and major event weeks)

A last minute request is not guaranteed

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Budget & Funding

Funding

- M.D. Program Student Organization funding is allocated to the M.D. Student Council by the main campus SGA through the Activity and Service Fee Budget (A&SF) (often referred to as SGA funding or dollars)

  - This budget is managed by main campus SGA. COM receives an allocation from this budget due to our closed interest groups
  - Record keeping is important to prove justification and need for COM organizations
  - Budgets spent on items beyond food are more highly regarded and help with our justifications and continued funding
  - M.D. Program Student Organizations are not eligible to apply for Conference and Travel Funding (CRT) as an organization but may do so as individuals

Budget

Current:

- UCF Fiscal Year June 30-July 1st
- Deadline- April 30th
- Future events must be within current fiscal year

Future:
- Budget Request assignment within webcourses
- Project events (i.e. Wintershow Case, Global Health Conference, etc)

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Tell me how to spend my money!

- Items/supplies
- Promotional items for your organization
- Printing Services through the UCF Print Shop
- Most services – if you are unsure, please email us
- Decorations for applicable events
- Licensing to show films *(incredibly* rare but possible if needed)
- Food items
    - Food for meetings or events when timing does not allow for students to bring their own lunch
    - Snacks for events
    - Guest Speakers

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Speakers

- Referred to as an Honorarium
- May cover travel, hotel and meal expenses
- Will be in the form of a check or wire transfer to your speaker after the date of the event
  - Can take up to 4-6 weeks to receive
- Provide a lump sum invoice for the total amount
- Cannot provide speaker fees to UCF Faculty or Staff

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Banking and Finances

- Organizations may open a bank account if your group receives any form of income (i.e. membership dues, grants, scholarships)
- To set up an account a group member must register for an EIN (employee identification number) - www.irs.gov
  - Have policies put in place to update this number once you leave the leadership position or graduate. Failure to do so may result in personal banking issues for you after graduation (trust us it's happened before)
  - We recommend uploading a copy of your EIN documents to your group's files section on webcourses
  - For a detailed step-by-step please access the "How to Obtain an EIN for Student Orgs" document from Harvard in the M.D. Student Organization webcourse
- Must obtain a letter of support from the Student Services team (send requests to Brooke Vercheski) to open an account and also to add or remove new/past members from the account
- Can open an account at any of the surrounding banks near COM – we recommend the Credit Union, Suntrust or PNC
- For spending your group should have policies in place to prevent unauthorized spending or misuse of group money (i.e. requiring two signatures on transactions) and detailed records kept of how money is spent
  - Must be ready to provide documentation at any time

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Banking and Finances - Taxes

- M.D. Student Organizations are not automatically tax exempt
- Many local or national affiliations have federal tax-exempt or 501©(3) exemption
  - If you're a chapter of a national organization check with them to see if your group is covered under the parent organization's tax-exempt status
- M.D. Student Organizations cannot use UCF's tax exemption to purchase goods or food without state sales tax
  - This excludes purchases made via a PRF

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Fundraising

Any fundraising ventures must be approved via the new process

Organizations may not solicit funds in any capacity without the approval of the Office of Development

Student Affairs cannot send out any emails soliciting funding on your behalf

For more information visit the Student Org & Events page under the Fundraising section

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Vendors

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Food Vendors

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Most commonly used & approved vendors

For items/supplies

(Online vendors only!)

- Staples.com
- Amazon (Prime only)
- Dollar Tree.com
- Oriental Trading.com
- Walmart.com
- Michaels.com

For Promotional Items/Print

- UCF Print Shop for all banners, brochures, magazines *(Free delivery to COM!)*
- Custom Ink.com
- Makestickers.com
- Stickermule.com

If you have any questions on if a vendor is approved please reach out to us.

Rule of thumb – if they can accept a VISA credit card payment over the phone, provide you an invoice up front, and do not require a deposit, we can make it work

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Event Planning
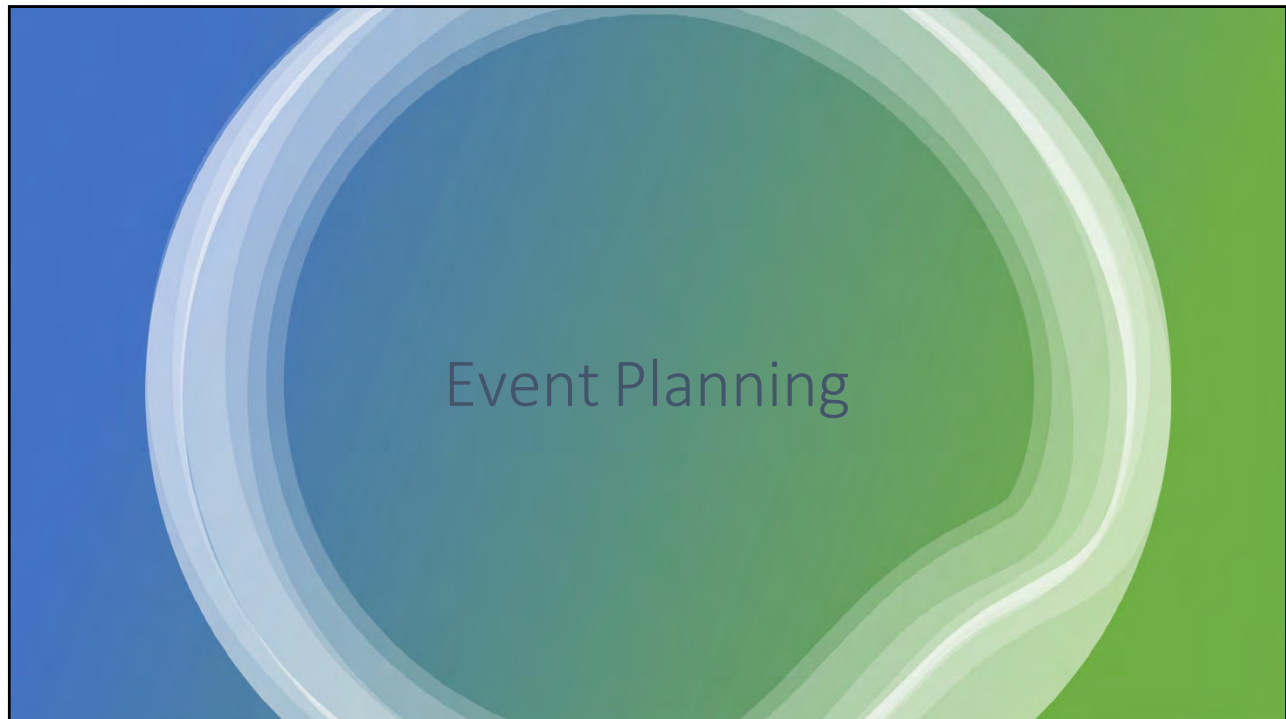
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Your Resources

Andrew Quigley
Assistant Director of Student
Students
Andrew.Quigley@ucf.edu
COM 115

Brooke Vercheski
Coordinator
Brooke.vercheski@ucf.edu
COM 109

Annika Holmstrom
Class Treasurer
annikaholmstrom@ucf.edu

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Start with us!

- All events on campus are reviewed by the Student Services & Events Management Team (EMT)
  - Student Services will contact all other depts (Facilities, Systems Engineering (A/V), Security, Operations, etc.
  - Check the Student Lounge Calendar! Make sure there aren't other events already scheduled
  - 2 per day
- Submit the Event Request/Room Reservation Form <mark>at least 14 business day</mark> before your event/meeting
- *Certain events require specific forms*

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What can you reserve?

- What rooms and spaces can you reserve on campus?
  - SGLs
  - Classrooms*/Lecture halls
  - The Atrium
  - Conference Rooms
  - Concourses
  - The Piazza or Tavistock Green

*If reserving the Microscopy Lab (401/404) note that **NO FOOD** is permitted in this space due to the equipment in the room

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1. Student Organization

2. Submit a room reservation request & PRF request!

3. PRF, flyer, and invoice sent to Andrew & Class Treasurer

4. Approve/Deny Request

5. Happy Student Organization!
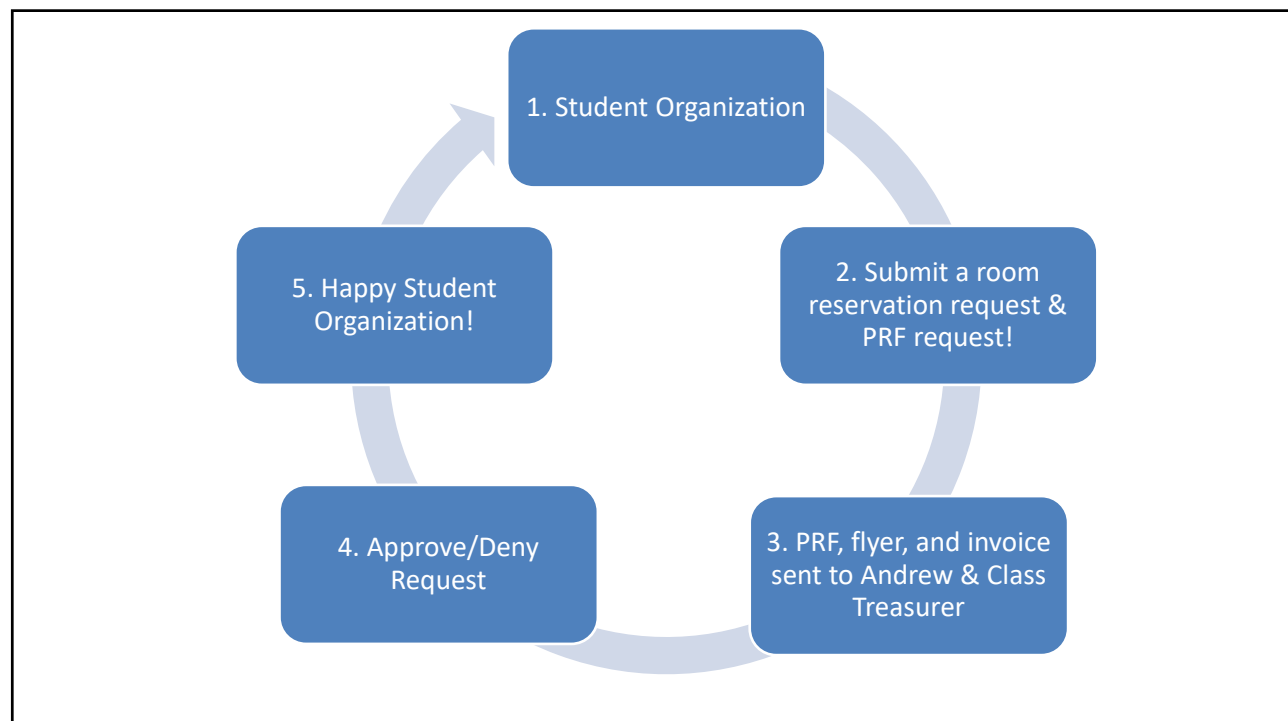
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Group Responsibility

- You are responsible for room cleanliness and damages
  - Including but not limited to: trash removal, cleanup of unauthorized decorations, moving of furniture, etc.
  - Any student organization can be held responsible for its actions or the actions of one or more of its members and event attendees
    - Cleaning fees maybe charged to the student organization should the room cleanliness or damages require additional supplies beyond the scope of traditional cleaning services
    - In some instances, the conduct of a single member or attendee may provide sufficient groups for action against the entire organization. Please follow the policies and rules ☺

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Student Organization Webcourse & Website

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Student Organization Webpage

- Student Organization Website & Webpage
  - All groups, boards and contact info is publicly listed for individuals to contact you with interest, opportunities, or inquires
  - Notify Student Services about any changes within your organization

- Room Requests & Event Planning

- Forming an Organization
  - How to and everything you need to submit a proposal

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Student Organization Webcourse

Welcome to the M.D. Program Student Organization!

Course Description

Within this course, Student Organization Leaders will be able to access all helpful and necessary information to run a successful organization while at the College of Medicine! This non-credit course has been built to better serve the busy student body at the College of Medicine.

Course Structure

- Guidelines & Guidance on creating and submitting event request!
- There will be assessments student organization leaders will need to complete throughout the year! Student Services will send friendly reminders through Webcourses Announcements & email.
- Student Organization Resource List

Modules

Module 1: M.D Student Organization Orientation
Module 2: 2024-2025 Board Election Information
Module 3: 2024 Orientation Presentation Material

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Student Org Webcourse

- All organizations have a group homepage where records should be kept, and board members can connect
- Use this course to communicate and plan events
- Keeping all records in one place not only assists with board transitions and continuity over the years but helps with funding justifications!
- Documents to be kept in the group's homepage section:
  - **Constitutions** – must be maintained by reviewing every year
    - Consider creating an archives folder in your group's files section
    - Upload latest version when updates are made
  - **Election application templates**
  - **Active member list/Email listserv**
    - Secretary's responsibility to maintain and manage their active members list and update documents accordingly
    - Collect this info from meeting sign-ins
  - **Annual Budget Requests**
  - **PRF Packets** for annual or reoccurring events
    - Helps maintain continuity from year to year, have a record of items your group has ordered that may be in the student org closet and aids in annual budget requests
  - **Event planning documentation**
    - Helpful for future boards and helps improve/grow annual events
  - **Contact information**
    - For faculty advisors, annual guest speakers, the group email account information
  - If applicable, **bank account information**

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Student Org Webcourse cont.

Turn on notifications for course!

Announcements will be the main form of communication for _general student organization information_ including but not limited to:

- Election timelines Event process updates
- Budget request collection Funding opportunity updates Orientation Fair sign ups Process or policy changes

Occasional group specific event or speaker opportunities to be shared with groups will be posted in targeted groups based on specialty or topic of interest
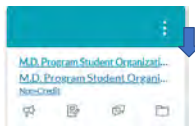
Assignments throughout the year include but are not limited to:

Budget request submission

Welcome email for Orientation Fair

Roster updates

Annual Constitution updates

Annual information quiz

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Student Org Webcourse

Course Dashboard

People Section
(where you can see all organizational groups and access the ones you are a member of)

Important note:

Student Services enrolls all students based on submitted rosters. This is why it is imperative any board member changes made are reported to the Office of Student Affairs.

Once new board members are reported and complete their Board Transition Checklists past board members will be moved into an archived group so new members can have access to all organizational records though the main group homepage.

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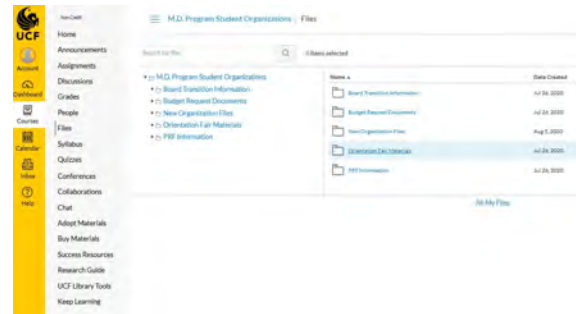## Student Org Webcourse

Files section - where you will find files for PRFs and logos, board transition checklist, a checklist for newly approved orgs, and budget request forms

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Questions?

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