Organizing an Event

UC SANTA CRUZ | Division of Student Affairs and Success

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The Organizer documents desired event details.

Name of Event,
Date & Time of Event,
Participants to be Invited (if <50),
Items Provided,
Cost of Items,
Cost of Rentals,
Total Cost of Event,
Agenda.

The Organizer reviews event details with their Supervisor, Analyst, and/or another optional reviewer.

Event complies with policy,
Aligns with unit mission,
Is appropriate,
Has all documentation required,
Is going to be routed to the right signers.

An EOA with appropriate authority reviews, edits, & initials the form.

Event complies with policy,
Has all documentation required,
Is routed to the right signers,
Is using valid payment methods,
Is using a valid fund source.

An EEC with appropriate authority reviews, edits, & signs the form.

Event complies with policy,
Has all documentation required,
Is appropriate in nature,
And fund are authorized for use.

The Organizer and/or Host tracks attendees, expenses, purchases, & other actuals event details.

List PO + Req #s,
Send receipts, card statements, or similar docs to your FA,
Take a list of attendees (if <50),
Ensure campus police are notified (if >50).

The Organizer submits all receipts & actual event details via ERF or MET.

Using the Financial Affairs Dashboard, the Organizer submits all final event information for approval, validation, & retention.
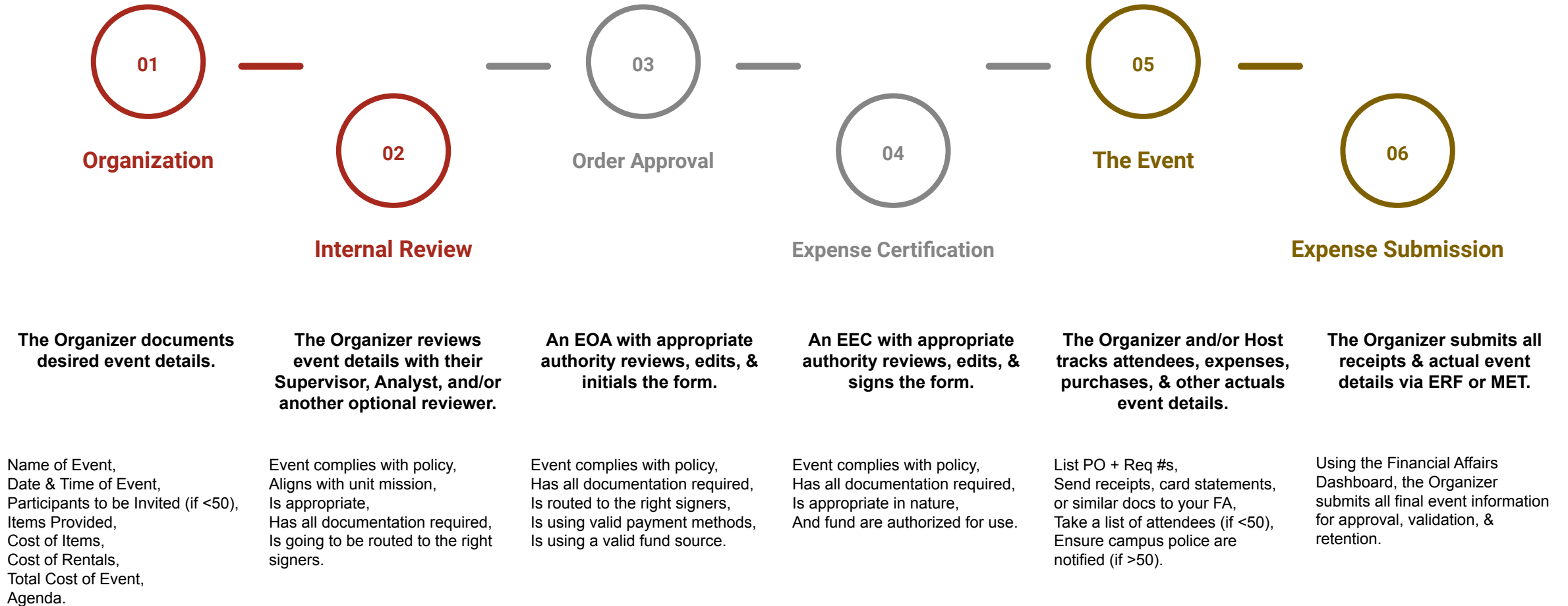
Organizing an Event

01

Organization

Steve is a Student Coordinator with Student Affairs.

Steve's Supervisor, Shelly, has encouraged Steve to put on an event for a group of students. Student Programming.

Steve decides to throw a "Movie Night" party to celebrate the students and build community. He's going to call it: *Indiana Jones & The Last Slice*.

Steve knows about 20 students will show up, at most, if it's around dinner.

They'll do a round-robin conversation about the academic year, highs & lows, with some sodas & snacks. Then, eat popcorn & pizza during an Indiana Jones movie.

The food & drinks will cost about $120.

02

Internal Review

Steve's Supervisor has an Executive Assistant who helps review event requests to ensure they seem reasonable and align with their Department's annual mission.

The Executive Assistant advises Steve to get a quote from a local pizza place for the event. Because of the event's cost, it will need to be reviewed & signed by their Financial Analyst and Supervisor.

Steve fills out PowerForm 1.3.2, entering the names & emails for himself, the assistant, their analyst, & the supervisor. This creates a DocuSign packet.

Steve checks his email & fills out Form 1.3.2 in DocuSign using the information he has gathered.

Useful Resources for Organizing

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Definitions of Events.pdf

Determine the Date, Time, Type, & Name of Event.

 Ent Ref 1.1.pdf

Create an Agenda & List of Invitees (flyer if >50).

Find Your EOA and EEC

Locate a Vendor; Obtain Quotes or a Menu.

Request F&E Event Approval

Work with an optional reviewer or your Financial Analyst to ensure you have all the necessary documents & details.

F&E Request Process Form

Organize & Review Your Event EARLY! Approval & Certification of an event should occur at least 2 weeks BEFORE the event is scheduled to occur.

Approving an Event

03

Order Approval

After Steve submits the filled out DocuSign form, the EOA receives their copy of the DocuSign form to review, edit, & sign. The EOA in this case is their Analyst.

EOAs are Event Order Approvers. EOAs are responsible for ensuring financial transactions comply with policy, are submitted properly, & that the event is directed to the correct Certifier or Top-Level Certifier.

Financial Affairs has a directory where you can search for EOAs and see the limits of their authority.

After the EOA signs the DocuSign, it is sent to the EEC.

04

Expense Certification

In this example, Steve's Supervisor is a valid EEC. An Event Expense Certifier who can approve Student Programming Events that cost less than $1,000.

Although this form has been reviewed by their Executive Assistant and their Financial Analyst, the EEC is responsible for ensuring that the event is appropriate and/or necessary and authorizing the funds to be spent.

Neither the EOA or EEC can act as Hosts, if an event requires a Host.

Once the EEC signs the form, it is forward to Budget & Financial Management for retention.

Useful Resources for Approving

Find Your EOA and EEC

EOA Delegation Authority Process.pdf

EEC Delegation Authority Process.pdf

Ent Ref 1.5.pdf

Request F&E Event Approval

F&E Request Process Form

Make sure the EOA & EEC have authority over the funds being used.

Make sure the EOA & EEC have the required authority level/limits to approve the event.

Using DocuSign's Collaboration feature to edit the existing form, instead of voiding a form that may require a few edits.

Use Policy Guides & Documents when reviewing.

After the Event

03

The Event

Steve is responsible for ensuring the event is conducted, that the purchases made are utilized, & for keeping a list of attendees and receipts. For some types of events, an additional "Host" may be required to help.

Steve should ensure that any & all forms have been submitted & signed at least 2 weeks prior to the date of the event; otherwise, the event may be postponed.

If Steve puts on an event before all the forms have been completed, some disciplinary action could be taken.

Leading up to the event, Steve can use the ERA, ERF, and/or MET forms to track & document expenses.

04

Expense Submission

Once the event has ended, Steve is responsible for submitting an Entertainment Reporting Form, Addendum, Meal Expense Tracker and/or other forms.

Depending on the methods Steve used to purchase goods & services, the forms used may change.

Steve should ensure that all available receipts, agendas, participant lists, & the original Event Request Form (1.3.2) are submitted with the ERF. Often, Form 1.3.2 can be used instead of other forms. Consult with your Financial Analyst.

If Steve paid out of pocket and needs to be reimbursed, Steve will be reimbursed via the Reporting Form.

Useful Resources **for Later**

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[Ent Ref 1.1.pdf](#)

[Entertainment Reporting Form](#)

[Entertainment Reporting Addendum](#)

[Meal Expense Tracker](#)

Begin using an ERF, ERA, MET, or Google Drive to track receipts, signatures, etc. ASAP.

If you pay out of pocket, you will submit for reimbursement using the ERF.

Consult with your Financial Analyst if you're unsure which forms to use!

Best Practices

Documentation: approval of events cannot be provided verbally, via CruzBuy alone, or via Pro-Card Statements, & must be auditable. An event organizer cannot approve their own event or expenses.

Receipts and Invoices: make copies of all payment documents. Submit payment forms to FAST/AP & your Financial Analyst immediately to ensure vendors are paid.

Forms You Can Use: Form 1.3.2 is a way to consolidate event planning, documenting approvals, agendas, & participant lists into one PDF document. This can then be submitted with receipts, invoices, etc. for post-event processing INSTEAD OF using an ERF or other Financial Affairs form.

*If you are planning multiple events at one time, consult with your Financial Analyst about the easiest process & whether to use 1.3.2 for bulk approval.