

## Procedures for Obtaining Funding

The Office for Diversity and Equity (ODE) provides funding to support specific programs and activities that are aligned with the ODE Mission. These funds can only be used to pay for pre-approved expenses. Funds for approved requests will be closed 60 days after conclusion of the event, after which any unused or unclaimed funds will not be disbursed.

**Please note:** student organizations should not expect to receive continuous funding from ODE for events. Each planned activity requires the submission of a new application and funding will be determined on a case by case basis. Additionally, applications from students/student organizations will not be considered unless they have already requested funds from the Vice President for Student Affairs. At UVA, the primary administrative source of financial support for student activities is the Office of the Vice President for Student Affairs (VPSA), and consequently students/student organizations should have made a written request for funds from the VPSA prior to seeking support from the ODE.

Also, we cannot approve or disburse funds resulting in a net profit to the requesting organization. Only fundraising events that will benefit external 501(c)3 charitable organizations are exceptions to this rule.

### **I. THE APPLICATION PROCESS**

The ***Fund Request Application Form*** must be completed in full, including a budget, and then submitted to Debra White, ODE Office Manager. When estimating the budget expenditures, the estimates listed under production and promotion must be as accurate as possible.

#### **The Budget:**

The budget should include all of the expected income and income sources for the event, co-sponsors, and all expected expenses for your program or event.

#### **Potential Funding Sources:**

- Contributions from individuals (students, parents, alumni, etc.)
- Contributions from your organization (dues, allocations, etc.)
- Co-sponsorships, grants or fee allocations from other UVA funding sources
- Grants from external foundations or corporations
- Revenue from ticket sales, entry fees, or registration fees
- Sale of event-related merchandising
- Sponsorships or advertising from private businesses (local or out-of-state)
- Sharing costs with event participants, performers, speakers, etc.

**The major categories of expenditures include: (Adapted from the UPC Handbook)**

#### **Potential Expenses for the program:**

- Catering (meals, refreshments, backstage hospitality)
- Printing of programs/tickets (programs, tickets, brochures, etc.)

- Rental of equipment (tables, chairs, delivery fee, set-up, etc.)
- Security (required at many venues for certain events)
- Space/Facility rental
- Technical services (lights, audio/visual, music, etc.)
- Travel (participants, speakers, performers, etc.)

**Promotional Expenses for the program:**

- Flyers and posters
- Table tents
- Paid advertising in student or local publications or on radio
- Promotional giveaways (i.e. buttons, key chains, cups, shirts, etc.)

**Supplemental Materials:**

In addition to the application for funding, organizations may submit additional materials to help ODE evaluate the program. This may include giving us a brief description of your organization, including its historical background and mission statement. If a printed schedule is available, that may be submitted along with any examples of your publicity materials. Lastly, please include a brief biography of speakers or entertainers that you are planning to invite.

**Submission Deadline:**

Application must be made and approved prior to the program date. We request you submit your package 90 days in advance for the most favorable consideration and a minimum of 30 days in advance. Applications that are submitted in a timely fashion are appreciated. Please keep in mind that ODE has a limited amount of funds and the earlier you submit your application, the better your chances for funding will be. ODE will attempt to accommodate unexpected events as they arise.

**Review Process:**

The ODE staff may need to contact the organization requesting funds for additional information to determine eligibility.

**Notification of Decision:**

Upon receiving a completed application, a decision will likely be made within two weeks.

**II. SPECIAL CONSIDERATIONS AND RESTRICTIONS**

**ODE will not be responsible for expenses incurred outside the restrictions and limitations for each topic outlined below:**

**A. UVA Internal Service Providers and Hiring External Services**

You are not required to use our internal service providers, but there are certain advantages to using them, such as:

- Internal Vendors can charge our internal account directly, thus eliminating out of pocket expenses for your organization. Please note that even in cases when internal providers bill ODE directly, you must submit to ODE an original receipt for the service.
- Reduced paperwork for the award recipient.
- Because of their location on-Grounds, they focus on service to the University community and student programs.

Some of the internal service providers are: UVA Dining Services (catering), Printing and Copying Services, Facilities Management (event set-up, A/V rental, etc.), Space Rental (Newcomb Hall, The Rotunda, Libraries, Gyms, Student Activity Building, etc.)

### **Hiring External Services:**

If your organization is hiring external vendors to provide services other than catering (i.e. DJ, training, etc.), ODE must pay the vendor directly. We CANNOT give third-party reimbursements.

If the vendor or individual has never done business with UVA in the past, then they must complete a [\*\*\*Vendor Registration Form\*\*\*](#) in order to receive payment.

### **B. Food and Beverages**

When seeking payment for any catering, restaurant meals, or food supplies (whether reimbursement or direct payment to a vendor), your organization must provide us with the following information on the ***Fund Request Application Form***:

- Date and time of event
- Location of event
- Number of attendees/number of people to be served
  - If 10 persons or fewer, provide names and titles for all
  - If more than 10 people, summarize by group (i.e., 25 students, 5 faculty, 5 guests, etc.)
  - Total cost including tax and tip, if applicable
- Specify whether it is a breakfast, dinner, reception, etc.

### **Spending limits for meals:**

The State of Virginia establishes per-person spending limits for meals, based on geographic area. Meal spending limits are inclusive (total includes tax and tip). If your program costs exceed the per-person limit, your organization will have to find alternative funding for the extra charges. These limits apply to catering, restaurant meals, and food supplies. If your event will include travel outside of Charlottesville, you will need to find out the state spending limits in that area. The list of limits by geographic area can be found <http://www.procurement.virginia.edu/main/departments/LodgingAndMealLimits.html>.

### **Catering:**

Although we do not require you to use any particular vendor, we highly recommend UVA Dining Services and University Contract Caterers. They are very familiar with student events and UVA's business practices. However, if you choose not to utilize a UVA vendor, please obtain at least two bids from other caterers, so that you can get the best price and product.

There are two ways that ODE can pay for catering. First, the caterer may bill ODE directly. If they choose to bill us directly and have not previously done business with UVA, then they must complete a [\*\*\*Vendor Registration Form\*\*\*](#). Otherwise, your organization must pay the catering bill and then submit receipts for reimbursement.

## C. Speakers and Performers

### **Honoraria:**

ODE may pay honoraria and travel costs for speakers and performers up to state limits. You must provide documentation for ODE to process the payment, although no invoice or contract is required for the honorarium since it is offered as a token of thanks. Our office must pay the honorarium directly to the lecturer or performer. We CANNOT do third-party reimbursements. UVA requires that the payee complete a [\*Vendor Registration Form\*](#).

### **Contracts:**

Applications for events which involve a contracted speaker or performer must include a copy of the proposed contract.

When you schedule a speaker or performer on a “fee for service” basis, a good written contract should outline the precise expectations of both parties. In this way, either side can be held accountable if, for example: the performer does not show, or the audio/visual equipment is not what was agreed upon, or perhaps the student organization neglects to pay, etc.

Since the contract is a legally binding document, we recommend that your organization enter into it only after careful review by an independent legal counsel. **Our office does not examine or approve contracts between student groups and outside vendors.**

When ODE is determining whether or not to contribute funds to a program that will involve a contracted speaker, we may seek advice from the Office of the General Counsel. **We strongly suggest you contact the University Programs Council (UPC) prior to submission of your [\*Fund Request Application Form\*](#) to ODE.** If UPC decides to co-sponsor the activity, they usually require that it conforms to strict guidelines in terms of security and other criteria. Working with UPC will make your event of professional quality and as top-notch as possible, and will be a great learning experience for you.

As with honoraria, our office must pay the contracted speaker or performer directly. We do not give third-party reimbursements. UVA requires that the payee submits an invoice and completes a [\*Vendor Registration Form\*](#).

## D. Travel

ODE may pay for approved travel expenses on a reimbursement basis only. If the estimated travel expenses are over \$500, the traveler must fill-out and sign the ***Travel Pre-Approval Form*** (the first tab of the Travel Workbook). This form must be given to our office for approval **before travel takes place**. Individuals that request travel compensation must submit a completed and signed [\*Travel Reimbursement Request Form\*](#) (the second tab of the Travel Workbook) with all original receipts attached.

**Note:** If the traveler is not affiliated with UVA (student, faculty or staff), then he or she will also need to complete and sign a [\*Vendor Registration Form\*](#)

**Spending limits for lodging:**

The State of Virginia establishes per-person spending limits for lodging based on geographic area. Hotel spending limits are exclusive, which means that the limit only applies to the per-night rate. You may request reimbursement for any additional lodging taxes or fees that are charged above the listed per-night rate. You must determine the lodging limit for your destination, because ODE cannot pay for per-night rates which exceed these limits. The list of limits by geographic area can be found at the [UVA Procurement Services website](#) ..

**Personal Vehicle Miles:**

In some cases, mileage may be approved for reimbursement. Repayment should be requested on the [Travel Reimbursement Request Form](#), where there is a line for the number of miles, which automatically calculates the total dollar amount to be reimbursed.

**Auto Rental:**

Auto rental may occasionally be approved on a reimbursement basis only, and it should be reported on the [Travel Reimbursement Request Form](#).

**E. Un-fundable Items**

**ODE CANNOT** provide funds for:

- Alcohol
- Awards (such as plaques, certificates, or any material award/gift)
- Flowers (as gifts, awards, or decoration)
- Gifts (including retail gift cards or gift certificates)
- Operating expenses that are not event-specific

**III. THE PAYMENT PROCESS****Disbursement of Funds:**

All disbursements require that you submit a [disbursement form](#) for each transaction. This must be accompanied by an original receipt(s) or invoice.

**ODE funds close 60 days after the conclusion of the event or June 1, whichever is sooner.** All repayment requests or invoices must be submitted before the end of the award period, unless your organization is granted an extension.

Any requests for extensions must be made in writing (e-mail is acceptable) to the ODE office manager before the closing date. Your organization must give a persuasive reason why the necessary receipts, invoices, etc. cannot be submitted within the time frame allotted.

**Internal Transfer to UVA Service Provider:**

This requires that ODE provide an internal billing code (known as PTAO) to the service provider on behalf of your organization. To do this, you will have to submit a **disbursement form** to ODE with the name of the internal provider for the service. The ODE Office Manager can give you further details if you wish to perform an internal transfer.

**Payment of Invoice Directly to the Vendor:**

Our office can pay the vendor directly. You must arrange for them to provide an invoice for payment, which you will submit to ODE with a *disbursement form*. See the heading for “**Special Considerations and Restrictions**” for further information.

**Reimbursement of Funds and Third-Party Payments:**

As noted before, event-related expenses that need to be reimbursed to your organization should be accompanied by a *disbursement form* for each of the individuals to be compensated. Please remember to include the original receipts. Repayment will be made via direct deposit, if available, or by check sent to the local address.

Remember that in order for ODE to reimburse a person who is not affiliated with UVA (student, faculty, or staff), he or she must complete a *Vendor Registration Form*. This form should be submitted to our office together with the *disbursement form* and receipts.

ODE **cannot** make third party reimbursements. If your organization decides to pay back individuals for their expenses, our office cannot in turn reimburse you.

**Vendor registration form available:**

<https://www.procurement.virginia.edu/main/frms/VendorReg.php>

**Travel reimbursement form available:**

<http://www.procurement.virginia.edu/main/forms/TravelWorkbookV2.xls>

**Lodging and Meal limits available:**

<http://www.procurement.virginia.edu/main/departments/LodgingAndMealLimits.html>

**Contact Information**

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