

Guide to Planning an Event

Congratulations on taking over a student group! LKSOM is very supportive of our student groups and would like to make the process of running an event as simple and smooth as possible. Therefore, we have created this document which explains each step to running an event.

The following 3 steps are required to successfully run an event. Each of these steps must be completed in order to successfully run an event.

1. Funding Request
2. Room Reservation
3. Reimbursement

Of note more information can be found at <https://studentcenter.temple.edu/hsc-student-organizations>.

General Activities Fund: The funding for all student group events comes from the General Activities Fund (GAF). These are funds that come from fees we pay in our tuition. The GAF is distributed by Temple Main Campus to SFC for the entire health science campus. Allocation of the GAF funds are overseen by the Budget Committee. The Budget Committee at LKSOM is made of the SGA Executive Board and members of the Student Affairs office. It is led by the Executive Board treasurer.

General Description:

- Funding is provided on a per event basis. This means that when a group would like to have an event they submit a request on owlconnect. Once approved funds will be moved into their account on owlconnect. Students **MUST** pay all costs out of pocket for the event. Once the funds have been spent the receipts are submitted on owlconnect, a reimbursement will be issued.
- Please note there is a separate process required if you plan to have food at your event. The description for this process can be found at <http://www.templemedsga.com/>. Please scroll over “Planning an Event” and click “Food Order Form.”
- If you are planning to purchase items via amazon then please send the specific links to filipp@temple.edu. This way the SFC can use their credit card and funds will be taken directly out of your account and you will not have to front the money.

Estimated timeline:

- 4 weeks (or more prior) to event: Submit funding request
 - 1 week (or less): Request for funding will be approved or rejected
- 2 weeks (or more) prior to event: Submit room request AND complete food requests
- 2 weeks (or less) after event: Submit receipts for reimbursement

Requesting Funding for New Groups without Owlconnect Account:

If you are a group that has been newly voted into LKSOM SGA you will not have an owlconnect account until the semester after you register. The only times to register are Oct 1-15 and Feb 1-15. In order to obtain funding for events you will need to work with the executive board treasurer. Funding will be provided via the Executive Board owlconnect account.

It is important to remember that you will need to follow the rules and regulations that guide all other groups. This includes the timeline. Therefore, it is vital that you read the entirety of this document.

There are only 2 differences from the process that is described below:

1. Instead of following the instructions under “**Funding Request**” you will fill out this form: <https://goo.gl/forms/y31Q7xIHOfhnOmpk> . Once this form is completed you must email the treasurer to let them know you have submitted the request.
2. Instead of following the instructions under “**Reimbursement request**” you will email the treasurer the following information:
 - a. Name of person who paid
 - b. Email of person who paid
 - c. Receipts of Payment

Funding Request:

The first step in the process of running an event is to submit a funding request. This must be done on <https://temple.campuslabs.com/engage/>.

Rules for submitting

1. Funding request must be submitted **four weeks** or more in advance of the event.
2. Funds **cannot** be used for the following:
 - a. Alcoholic beverages or events with alcoholic beverages present
 - b. Direct donations to political offices and most indirect donations to religious or charitable institutions. If a donation is requested, it will be decided by the Internal Allocations Committee and the donation must focus on impacting the student body
 - c. Honoraria or any expense associated with the appearance of candidates for public or political office
 - d. Clothing or costumes provided to individual members of an organization
 - e. An event limited to 1 segment of student population and is closed to the general temple community
3. Funds allocated to your group can only be used for the events that have been approved. For example if you received approval for \$200 for event A, but event A did not happen, you CANNOT use the \$200 in your account for event B. You must submit a new request for event B so that it can be approved.

Funding Request Process

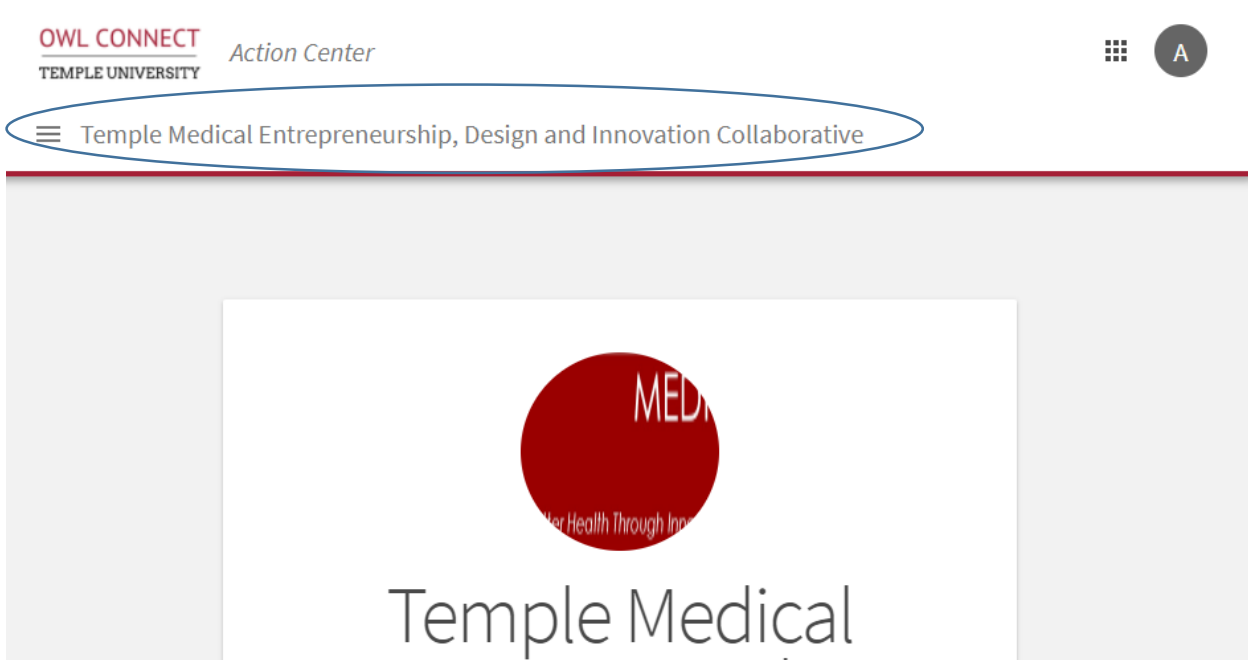
1. Go to <https://temple.campuslabs.com/engage/>
2. Sign in with your TU email and password
3. In the “**My Memberships**” section click your group name.

The screenshot shows the OWL CONNECT website interface. At the top, there is a navigation bar with 'HOME', 'EVENTS', 'ORGANIZATIONS', and 'NEWS'. Below this is a search bar with the text 'Explore Temple University' and 'Search Events, Organizations and News Articles'. Three featured cards are visible: 'Health Science Campus Spring 2018 Funding Request', 'Resident Assistant Application', and 'Inclusive Leadership Conference 2018'. Below these is a section titled 'My Memberships' which contains a single card for 'Temple Medical Entrepreneurship, Design and Innovation Collaborative'. This card is circled in blue.

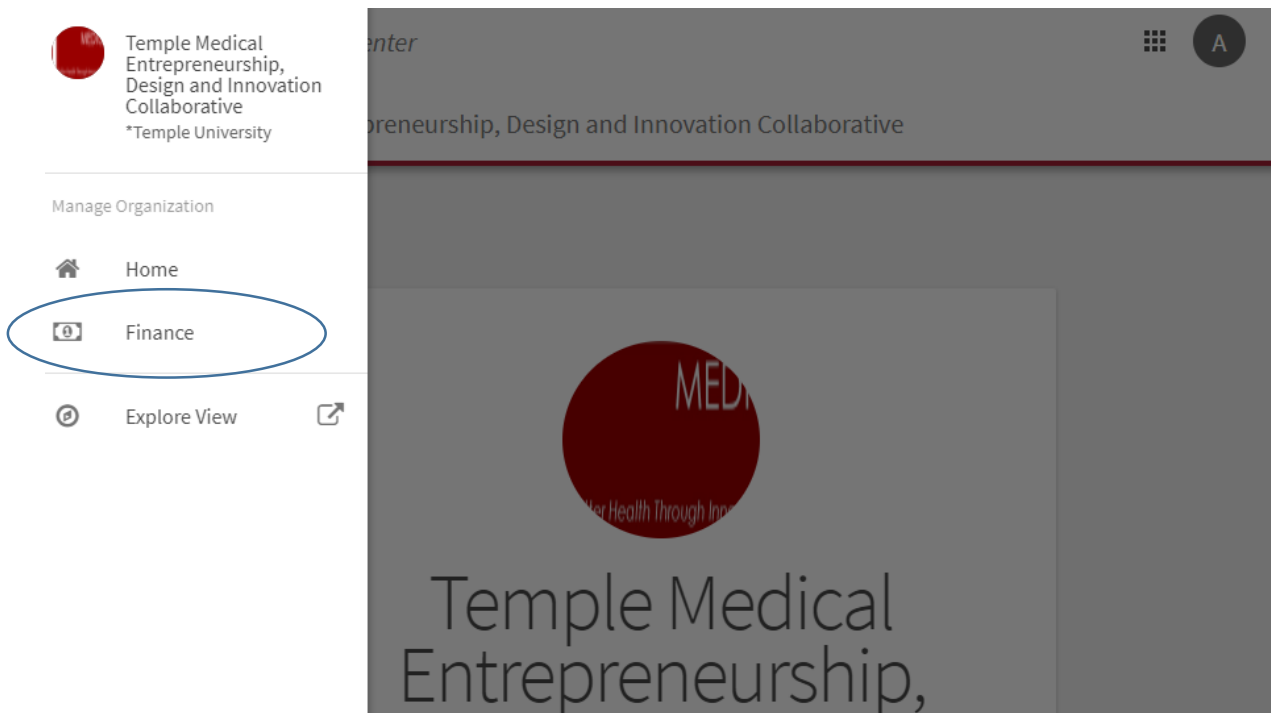
4. Click “MANAGE ORGANIZATION”

The screenshot shows the OWL CONNECT website interface for the 'Temple Medical Entrepreneurship, Design and Innovation Collaborative' page. The navigation bar at the top includes 'HOME', 'EVENTS', 'ORGANIZATIONS', and 'NEWS'. A 'MANAGE ORGANIZATION' button with a gear icon is circled in blue in the top right corner. The main content area features the organization's logo and name, a 'CONTACT' button, and a brief description: 'The goal of Temple MEDIC is to give rise to three design teams that would each identify a unique major health'.

5. Click on group three lines with group name in upper left corner



6. Click “Finance”



7. Click “Create Funding Request”

The screenshot shows the OWL CONNECT Action Center interface. At the top left, the logo for OWL CONNECT at Temple University is displayed. The page title is "Action Center" and the user is logged in as "A". The main navigation bar shows "Temple Medical Entrepreneurship, Design and Innovation Collaborative". The "Finance" section is active, with a red button for "+ CREATE PURCHASE REQUEST" and a blue button for "+ CREATE FUNDING REQUEST" which is circled in red. Below the buttons, there is a search bar and a table with columns: Subject, Approved Amount, Date Approved, Status, and Stage. The table is currently empty.

8. Complete entire page. Expect to have multiple sections where you write “0” or “N/A”; this happens for most clubs. This page is designed to cover all student groups of Temple University, so many questions are not applicable to Medical School clubs.

Room Reservation and inclusion on weekly announcements

Rules for Room Reservation:

1. The form must be submitted 2 weeks in advance of the event in order to reserve a room and publish the event in the Weekly Announcements.
2. If you are submitting for a recurring event, please mention this in the "Notes" section and only submit one form.

Room Reservation Process

1. Go to <http://www.templemedsga.com/>
2. Scroll over “**Planning an Event**”
3. Click “**Event submission form**” from drop down menu
4. Complete Event submission form.

This form will be sent to the people required to reserve a room, have the event added to the calendar, and have it added to the weekly announcements.

Reimbursement Request

Rules for Reimbursement

1. All requests for reimbursement must be completed within the 2 weeks following the event
2. If your group did not spend all of the money requested, please let the treasurer know so those funds can be put back into the general pot.

Reimbursement Process

A video describing the process can be found at:

<https://www.youtube.com/watch?v=0cS5TJ0Y2-Y&index=1&list=PLFqClOrPzNv0N0go6O5CbT1R6sWHt3104>

1. Perform steps 1-6 as described in “Funding Request section”
2. Selection **Create Purchase Request** (not **Create Funding Request**)
3. Complete form as seen. It is very important to save and submit all receipts.
 - a. Select TUSM category
 - b. Upload receipts
4. Select submit request
5. Once the reimbursement is approved you will receive an email
6. Pick up the reimbursement form from first floor SFC in Student Activities Office
7. Take the reimbursement form to the bursar office located on first floor of Kresge (to right of entrance)
8. Present form and your ID
9. Accept money

