



Events and Outings Financial Planning Guide

Last updated 03/21/2023 - Prepared by Jordan Brzezinski, Accountant, Business Services

Overview

When organizing an event or outing, Financial Operations has a set of policies and best practices to follow to ensure compliance and event success. The below guidelines give an overview of items to consider, departments to contact, and steps to be taken during the planning process. Please note this is not a complete list and there are additional considerations when we act as a fiscal agent for general public or other professional groups. This situation most common in some Continuing Education related events.

Guidelines:

- Reservations (such as T-times and space off campus)
 - Gather quotes for reservation costs
 - Submit a Purchase Requisition Form through [Shop UW+](#) to obtain approvals
- Prizes Awards and Gifts
 - If planning to give item(s) of value, such as, Prizes, Awards, or Gifts, you will need approval prior to purchasing the item(s).
 - Gather estimates or quotes from the vendor as appropriate
 - Complete the [Prizes, Awards, and Gifts eform](#)
 - Policy: [Prizes, Awards, and Gifts | UW Policies \(wisconsin.edu\)](#)
- Raffles
 - To conduct a raffle at an event, review the [Raffle License Guide](#)
 - Submit a [request](#) to use the UWSP Raffle License
- Catering and Food
 - On Campus Events:
 - Food events are guided by [UW Systems Administrative Policy 435: Headquarter City & UW System Sponsored Events Policy](#)
 - Complete sections A and B of the [Food Expense Approval and Payment](#) eform at least 2 weeks prior to an event
 - UW-Stevens Point Dining and Summer Conferences [On Point Catering](#) has right of first refusal for events held on campus.
 - Departments can seek other food options only after receiving a waiver from Dining and Summer Conferences a minimum of five (5) business days prior to the event.
 - Off Campus Events:
 - Gather quotes from vendors
 - Submit a Purchase Requisition Form through [Shop UW+](#) to obtain approvals
 - ShopUW+ requests must include a [Food Expense Approval and Payment Form](#)
- Advertising/Marketing for Event
 - All printed materials relating to the event must be purchased through [Point Print and Design Studio](#).

- If Point Print and Design Studio is unable to meet the need for the event, Point Print and Design Studio will look to the next state contract printer by law