**Financial Event Planning**

**3-5 Weeks or MORE Prior to the Event**

* Secure ALL vendors for the event
	+ This could be food vendors/signage/space/supplies/services
* Check with Colleen to see if that vendor has worked previously with the University, if not, it’s up to you to obtain a w-9 from the vendor. Please note, that it might take 2 or more weeks to add a vendor to our payment systems, so please keep this in mind when planning.
* OU – College of Engineering has house accounts with some food vendors, I have provided a list of some of them. I’m working to add to the list and update it periodically, so please don’t hesitate to contact me before connecting with a vendor.
* Set up times for vendors (delivery times/pick-up times – allow for them to be late or whomever is picking up the food to be late if coming from off campus)
* If you are reserving space or using a service (DJ/Photobooth/Etc.), please make sure that the vendor provides any rental agreements/contracts with the quote for the rental, and please forward to me as I will need a few weeks to get it through for signatures.
* Supplies
	+ Can be purchased by you and then reimbursed
	+ I can set you up in Crimson Corner to order things
	+ Your Faculty/Staff Advisor most likely has a P-Card and can purchase the items for you, depending on the item.
* Prepare a sign-in sheet for the event (this will need to be turned in with any invoices or reimbursements involving the event)
* When an event email is sent, or a flyer, or an Org Sync invite is sent, please be sure to include me, this way I have the information on hand for processing of invoices/reimbursements.

**The Day of the Event/Day After the Event**

* Collect invoices from any vendors (food/space/etc.) and bring them to me the day of the event or the day after. Some vendors will have space on their invoice(s) for tips, it is your responsibility that if there was a tip, to notate it on the invoice you provide to me. I need the following documents in order to pay a vendor for an event:
	+ An itemized receipt/invoice to show what all was purchased and that includes the total amount due to the vendor.
	+ A copy of the sign-in sheet.
	+ An email/flyer/Org Sync print out about the event.
* Submit any reimbursements to my office using the Reimbursement Procedures outlined by the GCoE and OU.