Guidance on College/Department Convocation Events
San José State University, Academic Planning & Budgets

Primary Issues:

1. Cash handling/management
   a. The preferred method of accepting payment for ticket sales is via the CASHNet e-Market system. Information about setting up an e-Market storefront, and the required forms, are available on the Bursar’s Office website at the following link.
http://www.sjsu.edu/bursar/services/campus_depts/emarket/

   b. Collection of currency or checks on-site is allowed but not preferred. Departments should follow the Bursar’s cash handling procedures, which are available at the following link.
http://www.sjsu.edu/bursar/services/campus_depts/satellite_ops/

   c. Funds should be deposited into a SJSU miscellaneous trust fund, unless a recognized student organization is running the event (see #2 below). The general SJSU Miscellaneous Trust fund (65183) may be used if annual deposits are less than $5,000, otherwise a separate fund should be established. Information about establishing a trust fund is available at the following link.
http://www.sjsu.edu/finance/policies_guidelines/trust_fund_guidelines/establish_new_trust/

   Effective immediately, all requests to establish a trust fund for convocation events will be placed on hold while the Budget and Risk Management Office transitions to a new fund management process for AY 2017-18.

   d. Convocation expenses must be posted to the same fund receiving convocation fees. It is not appropriate to deposit fees to a miscellaneous trust fund and charge expenses elsewhere as a means of generating “discretionary” funds.

   e. Finance charges administrative and risk coverage fees to trust funds with annual deposits above $5,000.

2. Student Groups/Organizations
   a. If a student group or organization is running convocation, they must deposit revenues with either SJSU (Bursar’s Office) or Associated Students, Inc. They cannot deposit money into a non-University or non-Associated Students (outside) bank account.

   b. Only recognized student organizations can deposit funds with Associated Students. Departments can deposit funds for unrecognized student groups, but there are workload implications for department staff under this model, including processing all business transactions and reporting fund status to the student group.
3. Graduating students should not be charged to attend convocation events.
   
   a. The University collects a commencement fee, which is part of the Document Fee ($15) students are charged each term. Departments are not to charge students an additional fee for convocation activities.
   
   b. Tickets may be sold to family members, friends, non-graduating students, alumni, etc., to attend convocation events. The ticket price can be set to cover all anticipated costs.

4. Contributions/donations to departments
   
   a. Contributions/donations may be collected with ticket sales IF they are optional, and clearly identified as an elective contribution separate from the ticket price. The ticket sales proceeds need to be deposited to either the University or Associated Students bank account, and donations must be deposited to Tower Foundation. There must be a clear demarcation of the funds whether contributions are collected in-person or via an e-Market store, with funds going to the correct account.
   
   b. Some contributions/donations may be large enough to be considered gifts. These should be properly processed through Tower Foundation so the donor’s gift is recognized and they receive a receipt for tax purposes. The threshold to qualify as a gift to the University is defined by Tower Foundation.

5. Contracts for services and event venues must be executed/signed by Contracts & Purchasing Services (in Finance)
   
   a. Only Contracts & Purchasing Services can sign/execute contracts, agreements and MOUs for SJSU. Faculty, department chairs and college personnel are not authorized to sign these documents. All agreements with event venues must be routed through Contracts & Purchasing Services. Plan early.
   
   b. Spartan Shops is the preferred campus caterer. Any other caterers must be pre-approved by the Contracts & Purchasing Services Department prior to your event. Please see the Catering Policy on the Finance Division website for instructions and contact information to obtain approvals. Requests for new caterers must be received two weeks in advance of the event to accommodate insurance and health certificate verifications.
   
   c. There are various ways to request and purchase products and services for your department. Descriptions of the various Procurement Pathways are located on the Finance Division website at: http://www.sjsu.edu/finance/financeconnect/resources/pathways/
   
   d. Once all necessary documentation is entered in FTS, the average processing time for requisitions is between two and eight weeks depending on dollar amount as follows:
      
      • Less than $10,000 Two Weeks
      • Between $10,000 to $50,000 Four Weeks
      • Greater than $50,000 Six to Eight Weeks