Purpose: To describe the education service products provided by SNRE and the proper process for implementing such services.

Target Audience: SNRE Faculty and Staff

General Guidelines

Education services include any education delivery other than academic teaching. This includes non-credit continuing education, non-credit certificate programs, workshops, seminars, conferences, contract education, etc. In order to streamline the administrative processes for these events, these education services have been divided into several categories which are defined in this procedure.

Extension District Workshops and Seminars
These are small seminars and workshops that are given in a particular extension district and led by one or more faculty members. This can include workshops given by state extension specialists or extension faculty from a different district. However, the main audience is the local district clientele. Expenditures and revenues will pass through the extension district operating account. Expenditures and revenues for those workshops that cover multiple districts (i.e. Master Gardner, CFPM, etc) will go through the SNRE Business Office Conference Account.

Process for the Workshop/Seminar:
1. Complete the “Workshop/Seminar Estimate of Revenue and Expenses” at the following link: http://www.uaf.edu/ces-snras-busoffice/fiscaltech/.
2. Submit completed “Workshop/Seminar Estimate of Revenue and Expenses” form to the Office Coordinator where the event will be taking place for approval of location, time, registration amount, and expenditures.
3. Submit completed “Workshop/Seminar Estimate of Revenue and Expenses” form to the Department Chair for approval of subject and content.
4. If you would like the SNRE Communications department to create marketing materials, please send completed and approved “Workshop/Seminar Estimate of Revenue and Expenses” form with any special instructions to snre-comm@alaska.edu. Submit at least 5 business days prior to desired marketing date.
5. If registration should be placed on the SNRE u-Store (for online registration payments), please send completed and approved “Workshop/Seminar Estimate of Revenue and Expenses” form with any
Education Services Procedure (Continued)

special registration instructions to the SNRE Business Office Fiscal Technician (Deb Gonzalez). Submit 3 business days prior to the desired posting date.

6. If registrations should be invoiced to an outside entity or paid by internal journal voucher, contact the SNRE Business Office Fiscal Technician (Deb Gonzalez).

7. Submit necessary **DEPT PURCHASE REQUISITIONS** to SNRE Business Office Purchasing Tech for such things as facilities rental, equipment rental, brochure printing, lodging for guest speakers, guest speaker fees (if any), catering, etc. allowing enough time for processing (at least one week before event for facilities rental/catering and earlier for items needed in advance of event like brochures/advertising). Wait until transactions are encumbered in Banner and UAF Purchase Orders or Call Numbers have been issued prior to entering into an agreement or placing an order with a vendor. You may enter into a tentative agreement for catering with a vendor (to reserve a date and get cost estimates) but please remember that a contract can be signed only by a UAF Purchasing Agent. Please see [Department Purchase Request – the Process](#).

8. Submit an approved/signed “Representational Expense Allowance Form” (requires Dean/Director’s signature) for each vendor along with the necessary DEPT PURCH REQ, LPO request, or Purchase Order Call Number for any food/snacks/meals provided at the Workshop/Seminar to the SNRE Business Office Fiscal Tech.

9. If purchasing Workshop/Seminar supplies on a ProCard, make sure to reconcile expenditures to the district account listed on the “Workshop/Seminar Estimate of Revenue and Expenses” form by the reconciliation deadline. ProCard purchases of food/snacks/meals need a waiver from Helen Conner as well as a signed “Representational Expense Allowance Form.”

10. Submit necessary **TRAVEL AUTHORIZATIONS** to SNRE Business Office for travel for guest speakers and/or special participants prior to purchasing any travel related expenses.

11. Issue UAF receipts for all registration fees received by the district office for Workshop/Seminar. Keep records of all registrations and prepare a list of participants.

12. Keep copies of all source documents for expenditures related to the Workshop/Seminar for submission with event recap.

13. Track all expenditures and revenues for the Workshop/Seminar. Submit to the SNRE Business Office all revenues on a deposit form every two weeks or when a $100 has been received, whichever comes first.

14. Within 10 days after the Workshop/Seminar, complete and submit the “Workshop/Seminar Recap and Budget Transfer Request” form to the Extension District Office Coordinator along with all revenue- and expense-related paperwork. Revenue-related (unless transmitted previously): a list of participants. Expense-related: copies of source documents and ProCard purchases with copies of receipts attached, travel expense report copies, and any Purchase Order Call Number invoices needing payment.
Education Services Procedure (Continued)

Accounting Process for the Workshop/Seminar:
1. Expenditures and Revenues will be run through the Extension District Operational Account. The district’s budget includes “seed money” to help cover expenditures until revenues from the workshops are received and credited.
2. In order for revenues to be used for expenditures, the expenditure budget must be increased by a budget revision. Send a copy of the completed and approved “Workshop/Seminar Recap and Budget Transfer Request” form to the SNRE Business Office in order for this budget revision to be completed. This request must be submitted to the SNRE Business Office at least 5 business days prior to the effective date of the request.
3. Any excess revenues can be used by the district for other programs related activities. Workshops/seminars operating at a deficit will use district budget to cover excess expenditures.

Small Conferences (less than $25,000 in Expenditures)
These are small regional or state conferences with less than $25,000 in projected expenditures and may be led by one or more faculty members. Expenditures and revenues will pass through the SNRE Business Office conference account.

Process for the Small Conference:
1. Complete the “Small Conference Estimate of Revenue and Expenses” at the following link: [http://www.uaf.edu/ces-snras-busoffice/fiscaltech/](http://www.uaf.edu/ces-snras-busoffice/fiscaltech/).
2. Submit completed “Small Conference Estimate of Revenue and Expenses” form to the Department Chair for approval of subject and content.
3. Submit completed and approved “Small Conference Estimate of Revenue and Expenses” form to the SNRE Business Office as soon as possible, but no later than 30 business days prior to the start of the event.
4. If you would like the SNRE Communications department to create marketing materials, please send completed and approved “Small Conference Estimate of Revenue and Expenses” form with any special instructions to snre-comm@alaska.edu. Submit at least 5 business days prior to desired marketing date.
5. If registrations should be invoiced to an outside entity or paid by internal journal voucher, contact the SNRE Business Office Fiscal Technician (Deb Gonzalez).
6. Submit necessary [DEPT PURCHASE REQUISITIONS](#) to SNRE Business Office Purchasing Tech for such things as facilities rental, equipment rental, brochure printing, lodging for guest speakers, guest speaker fees (if any), catering, etc. allowing enough time for processing (at least one week before event for facilities rental/catering and earlier for items needed in advance of event like brochures/advertising). Wait until transactions are encumbered in Banner and UAF Purchase Orders or Call Numbers have been issued prior to entering into an agreement or placing an order with a vendor. You may enter into a tentative agreement for catering with a vendor (to reserve a date and get cost estimates) but please remember that a contract can be signed only by a UAF Purchasing Agent. Please see [Department Purchase Request -- the Process](#).
7. Submit an approved/signed “Representational Expense Allowance Form” (requires Dean/Director’s signature) for each vendor along with the necessary DEPT PURCH REQ, LPO request, or Purchase Order Call Number for any food/snacks/meals provided at the Workshop/Seminar to the SNRE Business Office Fiscal Tech.

8. If purchasing Small Conference supplies on a ProCard, make sure to reconcile expenditures to the SNRE Business Office Conference account by the reconciliation deadline (contact the SNRE Business Office Fiscal Tech for the account number). ProCard purchases of food/snacks/meals need a waiver from Helen Conner as well as a signed “Representational Expense Allowance Form.”

9. Submit necessary TRAVEL AUTHORIZATIONS to SNRE Business Office for travel for guest speakers and/or special participants prior to purchasing any travel related expenses.

10. Issue UAF receipts for all registration fees received for the Small Conference. Keep records of all registrations and prepare a list of participants.

11. Keep copies of all source documents for expenditures related to the Small Conference for submission with event recap.

12. Track all expenditures and revenues for the Small Conference. Submit to the SNRE Business Office all revenues on a deposit form every two weeks or when a $100 has been received, whichever comes first.

13. Within 10 days after the Small Conference, complete and submit the “Small Conference Recap and Budget Transfer Request” form to the SNRE Business Office along with all revenue- and expense-related paperwork. Revenue-related (unless transmitted previously): yellow copies of receipts, checks, money orders, a list of participants. Expense-related: copies of source documents and ProCard purchases with copies of receipts attached, travel expense report copies, and any Purchase Order Call Number invoices needing payment.

14. Expenditures and revenues will be run through the SNRE Business Office Conference Account. Any excess revenues will be used by the Business Office to offset deficits of other small conferences prior to being made available for faculty members to use for other program delivery expenditures.

Large Conferences (greater than $25,000 in Expenditures)
These are large regional, state, national, or international conferences with greater than $25,000 in projected expenditures and may be led by multiple faculty members or a conference committee. Expenditures and revenues will pass through a Special Event Account.

1. Complete the “Large Conference Information Form”.
2. Complete the “Large Conference Budget Worksheet”.
3. Submit the “Large Conference Information Form” and the “Large Conference Budget Worksheet” to the Department Chair for approval of conference purpose.
4. Submit completed and approved “Large Conference Information Form” and “Large Conference Budget Worksheet” to the Professional Development Coordinator (Klaus Reich) in the Professional and Workforce Development Office.
Development department. He will work with the committee to get the accounting process approved and help with other conference coordination such as marketing, publicity, sponsorships process, logistics, etc.

One-Time Education Contracts
These are education services provided by SNRE to a specific entity or agency per their required deliverables. These are non-recurring events and not open to the general public.

1. Contact the Professional Development Coordinator (Klaus Reich) in the Professional and Workforce Development department. He will work with the entity to identify deliverables, get contracts signed, and set up the accounting process.
2. If a Reimbursable Service Agreement (RSA) is issued, the Recurring Education Contract process must be used.
3. If the expected contract amount is greater than $25,000, the Special Event Account Process can be used. Otherwise, the SNRE Business Office Conference account should be used for revenues and expenditures.
4. The Professional and Workforce Development department will set-up and maintain the registration process for these events through the u-Store, if applicable.

Recurring Education Contracts
These are education services provided by SNRE to a specific entity or agency per their required deliverables. These are recurring events that are not open to the general public.

1. Contact the Professional Development Coordinator (Klaus Reich) in the Professional and Workforce Development department. He will work with the entity to identify deliverables, sign contracts, and set up the accounting process.
2. This is considered a restricted project so must be processed through OGCA. A proposal and budget must be submitted per the normal external grant process.
3. The Professional and Workforce Development department will set-up and maintain the registration process for these events through the u-Store, if applicable.