

Budget Packet
Student Government Association
Budget Allocation Timeline for 2011 - 2012 Academic Year

September 30:	Budget Packets available for January – May programs on OSA website or in the Office of Student Activities – Hundley Hall. (www.lynchburg.edu/osa/xml)
October 6:	Treasurer’s Workshop (<i>mandatory for new clubs/new treasurers and those clubs that have not submitted requests in the previous budget cycle</i>) 8pm, Hopwood Auditorium
October 10 - 12:	Budget packet assistance by SGA vice president and/or treasurer, if needed. Sign up in the Office of Student Activities – Hundley Hall.
October 13 – 16:	Fall Break
October 21:	Budget Packets for January – May due to the Office of Student Activities by 4:30pm. Organization will sign up for Budget Hearings for October 28th and October 29th
October 24:	Senate Budget Committee Review of Budget Packets.
October 28 - 29:	Senate Budget Hearings, Schewel 229, Friday, 4p – 8p and Saturday, 12n – 7p. Sign up in OSA.
November 4:	Budget letters available in organization mailboxes by 12n.
November 11:	Budget Appeal Forms due to Office of Student Activities by 4p (forms found on line www.lynchburg.edu/osa/xml or SGA webpage).
November 16:	Senate Budget Committee Appeals Meeting (organizations DO NOT attend).
November 18:	Final notification on Appeals – letters in organization mailboxes by 5p.

February 3:	Budget Packets available for August – December programs available on OSA website or in the Office of Student Activities – Hundley Hall. (www.lynchburg.edu/osa/xml).
February 8:	Treasurer’s Workshop (<i>mandatory for new clubs/new treasurers and those clubs that have not submitted requests in the previous budget cycle</i>) 8pm, Hopwood Auditorium.
February 13 - 15:	Budget Packet assistance by SGA vice president and/or treasurer, if needed. Sign up in the Office of Student Activities – Hundley Hall.
February 17:	Budget Packets for August – December due to Office of Student Activities by 4:30p. Organizations will sign up for Budget Hearings for February 24th and February 25th
February 20:	Senate Budget Committee Review of Budget Packets.
February 24 - 25:	Senate Budget Hearings Schewel 229 Friday, 4p – 8p and Saturday 12n – 7p.
March 2:	Budget letters available in organization mailboxes by 12n.
March 3 – 11:	Spring Break
March 16:	Budget Appeal Forms due to Office of Student Activities by 4p (forms found on line www.lynchburg.edu/osa/xml or SGA webpage).
March 21:	Senate Budget Committee Appeals Meeting (organizations DO NOT attend).
March 23:	Final notification on Appeals – letters in organization mailboxes by 5p.

Student Government Association and Senate Budget Committee
Allocation Policies and Procedures
Revised Spring 2008, Spring 2010 and Spring 2011

The policies and procedures of the Allocation process are established by the Student Senate, which is the legislative branch of the Student Government Association to provide guidelines for the allocation, disbursement, and administration of the Student Activity Fee. This document is consistent with information provided in the Student Organization Handbook (<http://www.lynchburg.edu/osa/xml>).

I. Applicant Eligibility

- A. The club/organization must be recognized by Senate.
- B. The club/organization must consist of at least four registered students.
- C. The club/organization must be comprised of a percentage of LC undergraduate students numbering no less than 75%.
- D. The officers must be LC students.
- E. The club/organization must possess a Lynchburg College faculty or staff advisor.
- F. Every club/organization must fill out *annually* the Registration of Campus Organization Form and Hazing Statement regardless of whether or not they are requesting funds.
- G. There will be six president's council meetings during the year. Organizations must be represented at four of the six or will not be eligible for funding for the following year budget cycle.

II. Application Procedures:

A. Treasurer's Workshop/Meeting

1. Treasurer or a designee is highly encouraged to attend the scheduled Treasurer's Workshop/Meeting. Any **NEW** treasurer and any treasurers whose club **DID NOT** submit budget packet for the previous semester is required to attend the workshop/meeting, which will be held no less than two weeks before forms are due.
2. If a representative of an organization does not attend the workshop/meeting, that organization **MAY NOT** be allowed to receive funds from Senate for that budget cycle. **Treasurers or designee may not represent more than one organization.** It is the responsibility of each organization to send a representative to this meeting.
3. Each organization is required to make a copy of the budget packet for their records.
4. Supporting documentation must accompany paperwork. This includes but is not limited to: copy of the contract or other official documentation, supply order form, conference registration, etc.
5. Budget forms must be completed in blue or black ink and be legible. Budget forms are encouraged to be typed!
6. **Form must have required signatures of the president, treasurer and advisor.**

B. Reviewing Requests

1. Requests will be reviewed by the Senate Budget Committee in no particular order.
2. Organizations that submit late or incomplete request forms or do not attend the Treasurer's workshop/meeting as stated in A.1 and A.2, may be removed from the regular pool of requests and be considered for funding with penalties at a later date.

C. Organizational Hearings

1. Once funds have been requested, the Senate Budget Committee will meet with each organization during their scheduled time.

2. Organizations must sign up for a meeting time either at the Treasurer's Workshop/Meeting or in the Office of Student Activities, depending (location TBD each semester).
3. **Senate Budget Committee requests that the president and treasurer attend this meeting. If one or both cannot attend for extenuating circumstances, a member or other officer may attend so long as he/she has a clear understanding of the requests submitted.**
4. Organizations will be notified of their funding through their assigned mailbox outside the Office of Student Activities by the Vice-president and Treasurer of the Student Government Association.

D. Funding Timeline

1. Funding is requested by each organization during fall or spring semester. There will be a budget allocation first semester that will include activities and/or events for January through May. The second allocation meeting will be held second semester and will include the activities and/or events for August through December. Conferences occurring during winter and/or summer break will be considered on a case by case basis. Winter conferences should be submitted with the fall allocation paperwork and summer conferences with the spring allocation paperwork.
2. Senate Budget Committee will only fund events occurring within the proper allocation period and will not fund any expenses not incurring during the current allocation period.
3. Senate Budget Committee may only fund events during the defined school year. The school year, by definition, begins with the first day of Welcome Week for first semester and the first day of classes for second semester and ends on the final day of exams for first semester and graduation day for second semester. Conferences occurring during winter and summer break may be considered on a case by case basis as stated in D.2.
4. Dates for allocation meetings and deadlines for submission will be announced at the beginning of each academic year and announced at the Treasurer's Workshop/Meeting and will also be posted on the Student Activities Calendar and webpage.

III. Administration and Disbursement of the Student Activity Fee

- A. Funding for student organizations is based on the organization's membership, yearly registration, hazing statement, history (determining good standing or lack thereof) and account status (determining overages, and/or misuse of funds).
- B. The Senate Budget Committee reserves the right to deny funding to any organization for any activity based on the limited funds available for the allocation process.
- C. Co-sponsoring of activities, which combines funds is highly recommended. However, when co-sponsoring, funds should be DIVIDED not DOUBLED in requests.
- D. **Funds can be requested for the following (USE THESE CATEGORIES WHEN FILLING OUT PAPERWORK):**
 1. Programming: Services and activities that require contracts and/or payment to an outside source. They can be educational or social in nature and are directed primarily to the student community. Examples include, but are not limited to comedians, speakers, and/or tournaments. Documentation for any speaker, DJ, Sound Technician, etc. MUST be provided with paperwork or funding may be denied. Proof of copyright is included in supporting documentation as well.
 - a. The Office of Student Activities has sound technicians (DJs) that can be used at on-campus events and activities. Services are \$10 per hour.
 - b. Senate Budget Committee may fund up to \$500 to an organization who wishes to promote a multicultural event. Justification for the multicultural event must be included with the paperwork.

c. For any contractual service to be funded, paperwork must include a date and time, room reservation request, and contract and/or agreement from the individual /group invited.

d. Any programming request over \$3500 will be considered on a case by case basis, i.e., speaker, band, special event. Collaboration with other organizations is highly encouraged at this price level.

2. Conferences:

- Conferences will be considered on an individual basis. It is suggested that if the conference is one that is held every year for the club/organization that members attending be rotated. Senate Budget Committee reserves the right to deny funding based on the same members attending year after year.
- Attendees at conferences must be full-time undergraduate students at Lynchburg College.
- Senate Budget Committee will only fund conferences for four executive positions as defined by the organization provided an explanation of their specific position and purpose for attending the conference is included.
- Additionally, Senate Budget Committee will fund only 2 conferences per calendar year.
- The registration form **must** be included with the list of all attendees and explanation/purpose of attending for Senate Budget Committee to approve. If you cannot provide this information at the time of allocation, please submit a supplemental request to the Vice President of SGA once all information is completed.
- Conferences that are REQUIRED by National Organizations/Headquarters and occur during winter and/or summer break will be considered on a case by case basis PROVIDED supporting documentation stating such is included with paperwork.
- Any conference held during the summer, justification and explanation of any member attending must be provided. Senate Budget Committee will determine on a case by case basis if the conference and those scheduled to attend is necessary and justified. Attendees should be returning to Lynchburg College the following semester and not graduating the previous May.

3. Membership Recruitment: Senate Budget Committee defines Membership Recruitment as any MEETING or ACTIVITY that is being held to further increase the membership of the organization. Membership Recruitment, as a category, is limited to TWO per semester and it MUST BE attached to another event (i.e., cannot be its own event/activity).

Organizations may request up to \$50 for this category.

4. Office supplies: Supplies that cannot be found in the Office of Student Activities to be used for the general operation of the organization. These items may include, but are not limited to markers, tape, colored paper, etc. Organizations may request up to \$30.

5. Food: All food used for events and/or activities must be contracted through Lynchburg College Dining Services. Food requests must be submitted THREE weeks in advance of the event and/or activity. All hot food requests MUST be delivered per Dining Services. Please indicate if the event is CLOSED or OPEN. With the exception of Dominoe's all food requests must have supporting documentation. When using Dominoe's as a food option, please list as a separate category on the request. Failure to include this information will result in funding being denied for food for the event.

a. CLOSED EVENT: Senate Budget Committee will allot up to \$3 per person for food for that event. A closed event is defined as one held only for those members of that particular organization. Any event that is closed and will include alcohol will not be funded. See E.11 below. Senate Budget Committee will fund only ONE closed event per semester.

- b. **OPEN EVENT:** Senate Budget Committee will allot up to \$6 per person for food. An open event is defined as one that is open to the entire campus community and is realistically presented as an open event.
6. **Prize Money:** Prize money is to be used to purchase items to be used as prizes for the event. Examples include, but are not limited to gift cards/certificates, movies, Ipod, etc. Senate Budget Committee will allot up to \$150.
7. **Safety and Security:** Events and activities that expect a large attendance and/or will have alcohol present require the use of Lynchburg College Security as well as Lynchburg Police Officers. **Requests must be submitted through the Director of Student Activities no less than 30 days before the event date. A copy of the Safety and Security Request must be included with paperwork.** Prices for Security and LPD will be determined annually through Campus Safety and Security. Senate will cover these costs as needed for events.
8. **Printing:** To be used ONLY by media type organizations, such as The Current. An invoice or other documentation needs to be included with request from the company to be used for printing services.
9. **Profit Making LOANS:** Club/Organization can request up to \$100 for a loan for fundraising for the club/organization. Loans MUST be repaid in full by the end of each semester or club will not be permitted to request any funds for the following budget cycle or through supplemental requests and may not be permitted to request funds until loan is repaid in full.
10. **Special Needs:** For items that are not listed or do not fall “neatly” into any of the above listed categories. Additionally, this category is a onetime need for a particular event or activity.
- A description of the item(s), proof of cost, and relevance to the event are required for special needs to be considered by the Senate Budget Committee.
 - If Special Needs is being used for the purchase of equipment, Senate Budget Committee is requesting information of storage of said equipment, as well as previous expenditures and description of how broken/damaged equipment is handled.
 - Decorations may be considered in this category with supporting documentation of cost and relevance to the event. Decorations that are considered “non-disposable” will be considered on a case by case basis simply because of storage issues.
 - Special Needs, as a category, can only be used once per event or activity listed.

E. **Senate Budget Committee WILL NOT allocate funds for:**

1. **Travel expenses:** Travel expenses can be defined, but not limited to gas, mileage, toll, hotel, and vehicle rental expenses.
2. **Off campus events:** Any event that is held at a non-college location, including membership/dues or rental costs for Club Sports or other organizations that may use off campus locations for events/activities. These (as listed above)requests need to go through the Coordinator of Intramural/Club Sports.
3. **Any closed off-campus:** Examples include, but are not limited to Greek Formal, Class specific events, etc.
4. **Honorariums:** Honorariums are defined as payment given to a professional person for services for which fees are not legally or traditionally required.
5. **Stipends:** Stipends are defined as fixed and/or regular payment such as a salary or allowance.
6. **Direct Contributions:** Direct contributions are defined as charitable gifts to nonprofit organizations.

7. Membership Dues: Organizations are encouraged to include dues in their constitution if it is deemed necessary to the success of the organization.
8. Clothing, uniforms, ritual equipment, and club attire: Any personal item that would be used personally by the organization members and potentially “kept” by the individual members and/or organization, including but not limited to gavels, name tags, club polos.
9. Give-a ways: Any item that is not considered part of the larger event. If the give-a-way is to be considered as such, the category should be listed as either Special Needs or Other and a detailed description should be included in the paperwork.
10. Other Source Funding: Senate Budget Committee will not fund any organization under the jurisdiction of and/or receiving funding from a department, unless a written denial of funds from that department accompanies the budget paperwork. Organizations such as EMS, Class Councils, SAB and Club Sports will be handled on a case by case basis and if such organizations decide to come before Senate Budget Committee, MUST provide proof of denial from other source funding.
11. Alcohol: Senate Budget Committee will not fund alcohol for any event.
12. Repetitive Events: Senate Budget Committee will not fund more than THREE events of the same type. Examples include, but are not limited to hosting THREE movies, meetings, bingo nights, etc.
13. Closed Events: Senate Budget Committee will fund ONLY ONE closed event per semester. Definition of a closed event is one which only members of that organization are invited to participate in the event. Chapter meetings, holiday parties, formals, as well as recruitment events may be defined as a closed event by the Senate Budget Committee.

F. Allocation of funds will be handled as follows:

1. Organizations will receive a letter from the SGA Vice-president and Treasurer indicating if the budget proposal was approved, partially approved or denied, with an explanation. Letters will be placed in organization mailboxes outside the Office of Student Activities by 5p the Friday after Senate Budget Hearings.
2. The date(s) and title(s) of the organization’s events will be placed on a “Calendar of Events” for the distribution to the entire campus unless the organization notifies the Office of Student Activities NOT to do so.
3. **Receipts from events must be submitted within 5 business days after the event is held** or Senate reserves the right to withhold the funds originally allocated for that event.
4. Petty Cash Vouchers – Receipts for purchases made by Petty Cash Advances (Vouchers) are due within 5 days of the event. If not received within the 5-day period these funds will be deducted from your organization account and future purchases will have to be made in advance you will be required to submit a SGA Reimbursement Form with proper receipts for reimbursement. If you do not have an on campus organization account, the funds will be deducted from future SGA Allocated events.

IV. **Appeal Process, Event Changes and Supplemental Requests**

A. Appeal Process

1. An organization has the right to appeal an unapproved funding request by writing a letter of appeal (form on line at www.lynchburg.edu/osa/xml) to the SGA Vice-President, Treasurer, and Advisor.
2. Organizations not attending the Treasurer’s Workshop/Meeting as directed in Section II.1 and 2 and/or budget allocation meeting may not be allowed to appeal unapproved funding by the Senate Budget Committee.
3. Once the form letter is received, the Senate Budget Committee will convene, vote and come to a decision; the SGA Vice-president will contact the organization regarding the ruling, which is the final word and authority on the matter.

4. An appeal must be made within one week after the allocation process and is under the scrutiny of the Senate Budget Committee and SGA Cabinet.

B. Event Changes

1. If for some reason there is a change of date, time or location of an event, please notify the Office of Student Activities as soon as possible. If a date change is not appealed to the Senate Budget Committee two weeks prior to the date change (either the original date or newly scheduled date – whichever is earlier, Senate may not fund the event due to improper notice. This will be done on a case by case basis.

2. The funds that were allocated to an organization may be used only for the purposes designated by the budget committee. Any club officer who submitted a budget and misuses funds will be brought up on Honor Code charges, unless extenuating circumstances warrant the misuse. This will be reviewed on a case by case basis.

C. Supplemental Request

1. Any organization that chooses to submit for supplemental funding may submit a supplemental request form (www.lynchburg.edu/osa/xml) stating the reasons the funds are needed after the allocation period to the SGA Vice-president and/or Treasurer.

2. Supplemental funding will be considered on a case by case basis after the semester allocation process and following Senate guidelines, which state that supplemental funding will be heard following the Senate meeting on the second Wednesday of the month. Paperwork needs to be submitted the Friday before that meeting to be considered.

3. Supplemental funding should only be requested when an organization has the opportunity to sponsor an event/ activity that could not have been planned for during the appropriate allocation period.

4. Supplemental Requests are permitted by each organization ONCE per semester for two events/activities. The form will allow you to request funding for two activities.

Budget Packet Checklist

In an effort to reduce the number of appeals, as well as make the budget allocation process simple for the organizations, advisors, and Senate Budget Committee, please use the checklist below as you complete the Budget Packet! As always, if you have questions, please contact the Office of Student Activities or Student Government Association for assistance!

1. _____ Are you using the appropriate and current Budget Packet Paperwork? If you have questions about this, please check with the Office of Student Activities.
2. _____ Has your organization registered (or re-registered) for the academic year and signed the anti-hazing statement? This information can be found on the Student Activities webpage.
3. _____ Have you provided the requested information on the Budget Request Form (Name of organization, Representative Completing Form, Email and Phone Number, Purpose of organization)?
4. _____ Did you list activities and budget allocation information from previous allocation period? Clubs/organizations MUST provide a budget breakdown from the previous semester during budget allocations or funding for the requested period may be denied.
5. _____ Have you included supporting documentation for all requested funding for activities/events/programs (room request, contracts, menus,etc.)?
6. _____ Do you have the appropriate signatures of the president, treasurer and advisor required?
7. _____ Did you utilize the appropriate CATEGORIES to request funding, which can be found in Section III.D 1- 12?
8. _____ Do you have any CATEGORIES listed that cannot be funded by SGA, which can be found in Section IV.E 1 – 14?
9. _____ Have you checked your math when requesting funding? Incorrect requests may affect the total amount of the allocation. Senate Budget Committee will verify and approve the LEAST amount supported by the documentation, so be sure to double check.
10. _____ Did you double check the calendar about other events/activities that may be scheduled during your proposed events/activities?
11. _____ Did you make copies of your room request form, catering, etc. and give the originals to Ms. Deborah Brown in OSA to reserve your space and request your food, etc?
12. _____ Did you keep a copy of your budget packet for your files, as well as for any appeals you may need to request?

Activities Programs

The following are your organization’s proposed activities for the following semester. Spring allocation process is for events for January – May. Fall allocation process is for events August – December. Conferences scheduled during winter or summer will be considered on a case by case basis.

- **If your request is approved, you may only spend money for the specific events and activities, as well as the specific items you list below.**
- **The sections listed below each event and activity REQUIRES you to go into detail about each event and activity’s expenses.**
- **Please provide all supporting documentation for each event and activity. This includes, but is not limited to: Room Request, Contract, Catering Menu Request, etc.**
- **Failure to abide by these instructions and those listed in the Organization Budget Packet will result in your proposal being initially denied funding.**

Event/Activity/Program

I. Title of Event/Activity/Program: _____
 Description of Event/Activity/Program: _____

Date and location of event: _____
 Expected # of Students Participating: _____ Is the event OPEN or CLOSED (Circle)

Cost Breakdown

Cost

CATEGORY (Section III.D 1-12)

1.	_____	\$ _____
2.	_____	\$ _____
3.	_____	\$ _____
4.	_____	\$ _____
5.	_____	\$ _____
6.	_____	\$ _____

TOTAL COST \$ _____
 TOTAL REQUEST FROM SGA (if different from above) \$ _____

Event/Activity/Program

II. Title of Event/Activity/Program: _____
 Description of Event/Activity/Program: _____

Date and location of event: _____
 Expected # of Students Participating: _____ Is the event OPEN or CLOSED (Circle)

Cost Breakdown

Cost

CATEGORY (Section III.D 1-12)

1.	_____	\$ _____
2.	_____	\$ _____
3.	_____	\$ _____
4.	_____	\$ _____
5.	_____	\$ _____
6.	_____	\$ _____

TOTAL COST \$ _____
 TOTAL REQUEST FROM SGA(if different from above) \$ _____

Event/Activity/Program

III. Title of Event/Activity/Program: _____
 Description of Event/Activity/Program: _____

Date and location of event: _____
Expected # of Students Participating: _____ Is the event OPEN or CLOSED (Circle)

<u>Cost Breakdown</u>	<u>Cost</u>
CATEGORY (Section III.D 1-12)	
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
	TOTAL COST \$ _____
TOTAL REQUEST FROM SGA(if different from above)	\$ _____

Event/Activity/Program
IV. Title of Event/Activity/Program: _____
Description of Event/Activity/Program: _____

Date and location of event: _____
Expected # of Students Participating: _____ Is the event OPEN or CLOSED (Circle)

<u>Cost Breakdown</u>	<u>Cost</u>
CATEGORY (Section III.D 1-12)	
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
	TOTAL COST \$ _____
TOTAL REQUEST FROM SGA(if different from above)	\$ _____

Event/Activity/Program
V. Title of Event/Activity/Program: _____
Description of Event/Activity/Program: _____

Date and location of event: _____
Expected # of Students Participating: _____ Is the event OPEN or CLOSED (Circle)

<u>Cost Breakdown</u>	<u>Cost</u>
CATEGORY (Section III.D 1-12)	
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____
6. _____	\$ _____
	TOTAL COST \$ _____
TOTAL REQUEST FROM SGA(if different from above)	\$ _____

Event/Activity/Program
VI. Title of Event/Activity/Program: _____
Description of Event/Activity/Program: _____

Date and location of event: _____
 Expected # of Students Participating: _____ Is the event OPEN or CLOSED (Circle)

Cost Breakdown

CATEGORY (Section III.D 1-12)

Cost

1.	_____	\$ _____
2.	_____	\$ _____
3.	_____	\$ _____
4.	_____	\$ _____
5.	_____	\$ _____
6.	_____	\$ _____

TOTAL COST \$ _____
 TOTAL REQUEST FROM SGA (if different from above) \$ _____

I, the listed President of the Organization on this form, hereby agree to all the rules and regulations set forth by SGA and understand that by signing this, I have read and understand the rules:

 Signature of President

 Date

 PRINT NAME

I, the listed Treasurer of the Organization on this form, hereby agree to all the rules and regulations set forth by SGA and understand that by signing this, I have read and understand the rules:

 Signature of Treasurer

 Date

 PRINT NAME

I, the Advisor of the organization on this form, have met with the officers to review the budget request and understand that it is the responsibility of the organization president and treasurer to abide by the rules and regulations set forth by the SGA.

 Signature of Advisor

 Date

 PRINT NAME

 FOR SGA USE ONLY

Budget Approved Total \$ _____

Budget Not Approved:

Stipulations:

1. _____
2. _____
3. _____

Budget Partially Approved: Total \$ _____

Stipulations:

1. _____
2. _____
3. _____

 Signature of SGA Vice President

 Date

 Signature of SGA Treasurer

 Date