

**Budget Packet**  
**Student Government Association**  
**Budget Allocation Timeline for Academic Year**

**Spring (Allocations for next fall):**

<b>First Monday of Feb:</b> Treasurer's Workshop video available	Budget Packets available for <b>August – December</b> programs mj and
<b>Feb-March:</b>	Budget Packet assistance by SGA vice president and/or treasurer
<b>Last Friday of March:</b>	<b>Budget Packets for August – December due online</b>
<b>First week of April:</b>	<b>Senate</b> Review of Budget Packet Budget allocations for fall
<b>Third Friday of April:</b> SGA webpage).	Budget Appeal Forms due online by 4p (forms found online at
<b>Last Friday of April:</b>	Final notification on Appeals – letters to organization Emails

**Fall (Allocations for next spring):**

<b>First Monday of September:</b> Treasurer's Workshop video available	Budget Packets available for <b>Jan-May</b> programs mj and
<b>September-October:</b> treasurer	Budget Packet assistance by SGA vice president and/or
<b>Last Friday of Oct:</b>	<b>Budget Packets for Jan-May due online</b>
<b>First week of Nov:</b>	<b>Senate</b> Review of Budget Packet Budget allocations for fall
<b>Third Friday of Nov:</b> webpage).	Budget Appeal Forms due online by 4p (forms found online at SGA
<b>Last Friday of Nov:</b>	Final notification on Appeals – letters to organization Emails

**Student Government Association and Senate Budget Committee**  
**Allocation Policies and Procedures**  
**Undergraduate Student Organizations**  
Revised Spring 2008, Spring 2010, Spring 2011, and Spring 2014, Fall 2014, Fall 2015, Spring 2015,  
Spring 2018

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 student funding . This document is consistent with information provided in the Student Organization Handbook.**

**I. Applicant Eligibility**

- A. The club/organization must be recognized by the Student Government Association.
- B. The club/organization must consist of at least four registered students and each student can only hold one position (president, vice-president, secretary or treasurer)
- C. The following organizations receive funding from other sources and can not apply for funding through SGA:

**Residential Student Association**

**Fraternity and Sorority Life**

**Multicultural Center (all affinity groups)**

- Asian Pacific Islander Students Association (APISA)
- Black Student Association (BSA)
- Latino Student Association (LSA)
- Native American Student Association (NASA)
- Man2Man (M2M)
- Sexuality And Gender Acceptance (SAGA, the organization formerly known as GSA ) - Woman2Woman (W2W)
- Alpha Psi Lambda
- Student Diversity Council

**Spiritual Life Organizations**

- Buddhist Community
- BYOB (Bring Your Own Bible)
- Campus Outreach
- Canterbury Club (Episcopal)
- Catholic Campus Ministry
- Cru
- Disciples on Campus (Disciples of Christ)
- Garam Masala (Indian Religious Traditions and Culture)
- Hillel (Jewish)
- The Humanist Community
- Keeping Our Faith Residential Learning Community (for First-year Students)
- Lynchburg Christian Fellowship (LCF)

- D. The club/organization must comprise a percentage of Lynchburg undergraduate students numbering no less than 75%.
- E. All officers must be Lynchburg students.
- F. The club/organization must possess a University of Lynchburg full-time faculty or staff advisor.
- G. 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 through Presence (event and organization platform).

H. There will be monthly president's council meeting each semester. Organizations must be represented at the meeting each semester or will only be funded for a maximum of two events.

## II. Application Procedures:

### A. Treasurer's Workshop/Meeting

1. All treasurers and clubs/organizations are encouraged to attend the semesterly treasurer's workshop if they need assistance. They may also reach out to the director of finance for help. Additionally, any **NEW** treasurer and any treasurers whose club **DID NOT** submit a 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.

a. The Student Government Association Budget Committee reserves the right to make a Treasurer's Workshop mandatory for all clubs requesting funding if there are new amendments to the policies and procedures.

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. **Treasurer or designee may not represent more than two organization.** It is the responsibility of each organization to send a representative to this meeting.

3. Each organization is required to save a copy of the budget packet for their records.

4. Supporting documentation must accompany applications. This includes but is not limited to: copy of the contract or other official documentation, supply order form, room request 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. Budget forms must include current list of active members and their expected year of graduation.

7. **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 Engagement and Leadership Development, depending (location TBD each semester).

3. **Senate Budget Committee requests that the organization's treasurer attend this meeting. If he or she 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 electronic E-mails by the 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 in the spring semester and summer conferences with the spring allocation paperwork in the fall semester.

2. Senate Budget Committee will only fund events occurring within the proper allocation period and will not fund any expenses not incurred 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 University Calendar and webpage (Student Life).

**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, such as movie rights, play rights, etc., should be included in supporting documentation as well.

a. The Office of Student Engagement and Leadership Development has sound technicians (DJs) that can be used at on-campus events and activities. Services are \$10 per hour.

b. For any contractual service to be funded, paperwork must include a date and time, room reservation request, and contract and/or formal invoice

2. Conferences:

- a. 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.
- b. Attendees at conferences must be full-time undergraduate students at University of Lynchburg.
- c. Senate Budget Committee will only fund conferences for four members as long as their attendance can be justified.
- d. Additionally, Senate Budget Committee will fund only 2 conferences per calendar year.
- e. 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.
- g. 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 University of Lynchburg 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. **Food:** When possible, **food used for events and/or activities must be contracted through University of Lynchburg Dining Services or Domino's.** 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 Domino's all food requests must have supporting documentation.** When using Domino's as a food option, please list as a separate category on the request. All other dining services forms, (i.e. Ice Cream, picnic, delivery, and specific invoices, etc.) should be totaled into one "Dining Services" category. Failure to include this information will result in funding being denied for food for the event.

a. If food requests cannot be fulfilled by University of Lynchburg Dining Services please refer to sections III.D.10 and III.D.11 and III.D.12.

b. 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 and/or specifically invited participants. 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.

c. OPEN EVENT: Senate Budget Committee will allot a maximum of \$6 per person for food, including a \$3 maximum from the \$6 for Domino's for that event. An open event is defined as one that is open to the entire campus community and is realistically presented as an open event

5. 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. **Breakdown of purchased items must be included.** Senate Budget Committee will allot \$3/person up to \$150 for open events and \$2/person up to \$75 for closed events.

- a. Gift cards and certificates cannot be Visa, MasterCard, Amazon, etc., but must be to a specific store or location.

6. Safety and Security: Events and activities that expect over 100 students or be open to the public or will have alcohol present require the use of University of Lynchburg 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.

7. Multicultural Events: Senate Budget Committee may fund up to \$500 to an organization who wishes to promote a multicultural event. A multicultural event is an event or activity that relates to or promotes a cultural or ethnic group within our campus community.

- a. Justification for the multicultural event must be included with the paperwork and should include a letter of rationale from a faculty or staff member involved with the event.
- b. This category can only be used for one event per budget request period.
- c. 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.

8. Special Needs: For items that are not listed or do not fall “neatly” into any of the above listed categories. These items may include, but are not limited balloons, streamers, tablecloth, lights, office supplies, etc. Additionally, this category is a one time need for a particular event or activity.

- a. **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.**
- b. **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.**
- c. **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.**
- d. **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. Honorariums: Honorariums are defined as payment given to a professional person for services for which fees are not legally or traditionally required.

4. Stipends: Stipends are defined as fixed and/or regular payment such as a salary or allowance.

5. Direct Contributions: Direct contributions are defined as charitable gifts to nonprofit organizations.

6. Membership Dues: Organizations are encouraged to include dues in their constitution if it is deemed necessary to the success of the organization.

7. Clothing, uniforms, and club attire: Any personal item that would be used personally by the organization members and potentially “kept” by the individual members, including but not limited to gavels, name tags, club polos.

8. Give-a ways: Any item that is not considered part of the larger event, and for which no participation in the event is required. Participation is defined as active engagement with the programming or event (i.e. asking a question of a speaker, or completing a scavenger hunt). 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.

9. 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, Fraternity and Sorority Life, PACE, Spiritual Life, 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.

10. Alcohol: Senate Budget Committee will not fund alcohol for any event.

11. 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.

12. 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. Regular organization 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 Treasurer indicating if the budget proposal was approved, partially approved or denied, with an explanation. Letters will be placed at the HUB of the Drysdale Student Center for collection by the organization’s representative 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 Engagement and Leadership Development 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) 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.

##### **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 Engagement and Leadership Development as soon as possible. If a date change is not appealed to the SGA Executive Treasurer and Vice President Three 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 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.



## **V. Clubs and Organizations - Student Government Association Senate Seats**

The following is the process by which SGA and the Senate Budget Committee will effectively serve the clubs and organizations with Senatorial seats.

1. The appointed seats, as identified in Article IV, B.a. i., of the SGA constitution will receive \$350 annually towards their budget, to be awarded in the spring semester and to be used at the discretion of the club, so long as it does not violate campus-wide policies. Additionally, these groups will have the opportunity to go through budget allocations before the general club/organization process. Their funds will be taken "off the top," thus giving them priority over the general clubs/organizations. In order for these groups to receive funds the following requirements must be met:

2. The held seats, as identified in Article IV, B.a. ii., will receive 50% of their requested budget (no more than \$1000 total requested for a \$500 allotment) per semester and be given priority for budget allocation, going before non-senate seat clubs/organizations, but following the appointed seats.

Failure of senator representing any of the seats to complete these requirements, may forfeit his/her club's and/or constituent group's ability to serve the following semester and/or loss of budgetary allocations. Any questions or concerns can and should be brought up with the Executive Committee of the SGA. Additionally, senate seat structure, as related to budget, will be reviewed annually by the Senate Budget Committee.

### **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 Engagement and Leadership Development 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 Engagement and Leadership Development.
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?