

Student Activities Budget Committee Guidelines

Goals of the Student Activities Budget Committee, a joint committee of the Student Life Council and United Student Government:

1. To promote the educational and personal development of the Fordham community by providing co-curricular and extracurricular activities, which will foster interaction among students.
2. To provide funding for Fordham clubs and organizations to create events for students with the purpose of developing intellectual growth and offering opportunities to develop leadership qualities.
3. To provide opportunities for social and cultural activities that are open to the entire Fordham community.
4. To ethically review and consider all appeals by all clubs in an effort to fairly allocate the Rose Hill student activity fee.

Standard Funded Clubs and Organizations

The term “Standard Funding” refers to a funding classification of clubs and organizations in the Fordham Community who apply for funding with specifications of line-items and backup documentation for all purchases and whose semesterly Budget Day Packets vary in amount.

Required Information and Statements to be Eligible to Receive Funding

1. For all clubs who receive funding on a standard funding basis:
 - a. They must adhere to the subsequent rules listed in “**Guidelines of the Budget Committee**”.
 - b. Submit a complete Operations Packet.
 - c. If a club or organization with a club suite is in violation of the “**Club Suite Guidelines**” outlined by the House Committee, a budget sanction on funding requested from the Student Activities Fee may be imposed. This sanction will be delivered at the discretion of the House Committee and enforced by the Budget Committee.
 - d. There are two channels through which to receive funding:
 - i. Budget Packet
 1. A projected budget for the following semester, which will be reviewed on Budget Day (See “**Budget Day**” below).
 - ii. Weekly Appeals
 1. This consists of new budget appeals, date changes, or reallocations, during the current semester, where funding is allocated on a rolling basis.
 - a. If a club or organization is allocated a certain amount of funding by the Budget Committee, this is not event confirmation, the event must still be approved in OrgSync through the Office for Student Involvement.

Guidelines of the Budget Committee

The Committee expects that all appeals will meet the following criteria and holds the following rules:

Prohibitive Guidelines

1. Clubs are not allowed to purchase alcoholic beverages.
2. Clubs are not allowed to pay bartenders.
3. Clubs are not allowed to issue any loans, donations, or grants with money provided by the Budget Committee.

4. Clubs are not allowed to deposit funds, in total or in part, into private accounts.
5. Clubs are not allowed to pay salaries (in any form) to any student of Fordham University.

Fundamental Guidelines

1. **Reallocation Requests:** If a club does not use all of the funds allocated for an event *before* that event occurs, the unused funds may be reallocated to a different, future event. Clubs who receive funding on a standard basis are required to submit back-up documentation for the new line item(s) they intend to purchase with the reallocation, as with a new budget appeal.
 - a. Reallocations will not be approved if the date of the event from which the funds are being transferred has passed when the committee considers the request. The only exception is when the request has not been considered due to an unusual inability to meet and vote on the committee's part.
 - b. If the club requests a date change, and it is approved by the committee, the approved date will be considered the new date of the event.
 - c. The committee will permit reallocations with the funds for one event to be reallocated to up to three events. When reallocating from one specific line item within an event to purchase a new line item for that same event, this does not count as one of the three reallocations. (i.e. Reallocating money for pizza at a welcome event for sandwiches at the same welcome event).
2. **Date Changes:** When clubs submit new budget appeals, they are required to choose the date on which the event or activity will occur. If a club can no longer hold the event on the date for which it was originally scheduled, they can submit a date change request to push the event up or back, but not before the day in which the date change request was submitted.
 - a. No back-up documentation is required to accompany date changes.
 - b. Clubs are only permitted to submit date changes if the original date of the event has not yet passed. Once the date has passed, the club no longer has access to that funding.
 - c. The new event date selected must fall within programming.
3. **Dates of Programming:** Each standard request for funding must provide an event date that falls within open dates of the university as provided on the Fordham University's website.
4. **Attendance:** All appeals must provide a number for projected attendance for events so the committee may make the most informed decisions regarding allocations.
5. **Back-up Documentation:** Verifiable documentation is required for all services and products funded by the Budget Committee.
 - d. The documentation *must* be from a reliable source associated with the service provider or product. A "reliable" source is defined as a document, which is clearly from the service or product provider.
 - e. Back-up documentation, including screenshots, must have the name, logo, address and other contact information for the product/service provider, where applicable. If the source is an email, the documentation must include the "to" and "from" fields of the email and a signature showing the person's title or affiliation. Emails must also state a confirmation of the cost requested on the appeal and the particular product/service to be purchased.
 - f. When the line item requested amount does not match the amount on the backup documentation, the committee will fund the lesser of the two. If the cost of a line item is calculated by the club to reflect a quantity greater than one, the club must explain how many of each line item is needed, and show the math for arriving at the cost. If the club does not provide this, the committee will only fund the quantity listed on the back-up documentation
 - g. Back-up documentation is not for required when requesting funds for Fordham security guards, copy card renewals, and MetroCards.

- h. There are additional backup documentation requirements for speakers and performers. (See “**Speakers**” below).
 - i. Only backup documentation from within the past twelve months is valid.
6. **Food and Refreshments:** Clubs can request funding for food and refreshments at an event.
- a. Events that are sit-down/banquet style, in which the underlying purpose of the event is focused around the meal, will not be funded beyond \$20 per person attending. Events that are not a sit-down/banquet style function will only be funded \$10 per person attending.
 - b. The committee can fund up to \$100 per club per semester for food for the enhancement of events. Food enhancement will enrich the event and increase participation, but is not essential for the event to occur.
 - c. If food is essential to the event, the committee requires that clubs thoroughly explain how food is essential for the event to occur in order to receive funding. Essential food requests mean that the nature of the event is dependent upon the serving of food or refreshments and that the event would not be able to occur without it.
 - d. An itemized menu for all for food requests should be attached to the budget appeal submitted, with the items requested clearly highlighted or marked. If the items intended to be purchased are not clearly marked for the committee, food cannot be funded.
7. **Speakers and Performers:** Clubs must provide additional backup documentation for all speakers including: a biography, price and availability verification for performers.
- a. *Outside Speakers:*
 - i. Clubs must provide a biography for any outside speaker, which require a minimum of one paragraph outlining the performer’s background (where they are from, their credentials in their respective field, notable awards/performances/recognition, etc).
 - ii. Clubs must provide verification that the outside speaker is available on the given date and at the given price communicated to the committee. Acceptable forms of verification include a speaker’s contract or a screenshot of emails between the two parties that explicitly confirm the date and price.
 - iii. Clubs that are requesting funds for speakers or performers with all-inclusive fees of over \$1,000 are required to submit a copy of the performer’s contract. It does not have to be signed by either party. If the performer does not have a specific contract, then a Fordham contract **signed** by the performer is acceptable. This requirement is in addition to the requirements of proof of availability, price, and biography. (See “**Back-up Documentation**”).
 - iv. If a speaker is free, but funding is being requested for other aspects of the event, a biography and availability confirmation *are* still required. The fee must be all-inclusive and reflect all other expenses including transportation, meals, lodging, etc.
 - v. If outside speakers or performers hold an event and are not requesting an honorarium, they can also receive a token of thanks not to exceed \$25 in value. These requests must also include full backup documentation of biography of the speaker and confirmed availability.
 - b. *Fordham University Speakers/ Performers:* A member of the Fordham community (i.e. faculty, staff, and administration) who presents, lectures or programs at events hosted by student clubs or organizations cannot be paid by student activity funds. However, they may be given a token of thanks not to exceed \$25 in value. Back-up documentation is still required for funds for university speaker events.
8. **Marketing:** Back-up documentation is required for any allocation towards marketing. Marketing must be tied to a specific event or activity--clubs cannot ask for general marketing funds.
- a. T-shirts, flyers, stickers, and social media advertising may be used for marketing when they are directly tied to an event or a campaign consistent with the club’s purpose.

9. **Fundraising (does not apply to clubs that are designated as fundraising organizations):**
 - a. The committee may fund no more than \$100 per semester for the sale of food, drink or other items to raise self-generated funds. Clubs are allowed to distribute this \$100 amongst any number of fundraisers.
10. **Prizes (i.e. items intended to be awarded to individuals):** The Committee may fund up to \$200 per club per semester for the purchasing of prizes.
 - a. Prizes may be funded on the condition that they are accessible to the Fordham community regardless of club membership status.
 - b. The Budget Committee will not fund cash prizes or the cash equivalent (i.e. Visa gift cards or American Express gift cards).
11. **T-shirts:** The committee may only fund t-shirts or other apparel for sales, fundraisers, costumes, or cause awareness campaigns. Clubs must explain the purpose of the t-shirts in their requests.
 - a. T-shirts cannot be funded as a general marketing tool. It must be associated with a specific event or campaign.

Operational Guidelines

1. **Clubs Responsibilities to the Operations Committee:** The student club or organization must be registered and in good standing with the Operations Committee before a budget request can be submitted to the Budget Committee.
 - a. The Operations Committee will consider a club "in good standing" if it has submitted an Operations packet for that semester. For clubs who were approved by the United Student Government mid-semester, an Operations Packet will not be necessary to obtain funding for the first full semester of operation.
2. **Mission and Scope of Funding Request:** The event for which funding is requested is within the scope of the club, evidenced by the club including a direct excerpt from its constitution in the appeal.
3. **Exclusivity and Club Membership:** All clubs funded by the Student Activities Fee must be open to all Fordham students who meet the requirements for membership.
 - a. Clubs with selection or application processes are considered to be open to the whole student body provided that the selection or application process is initially open to all Fordham students.
 - b. Student activity funds allocated by the committee may not be used to sponsor exclusive events.
4. **Over-Expenditures and Club Debt:** It is the policy of the Student Activities Budget Committee that no club or organization may spend more for an event than the balance existing in its treasury account prior to the event. Clubs are responsible for tracking their own treasury account and the dates of when their funding will expire. Clubs are expected to cover expenses not covered in their Student Activities Fee allocation with their self-generated funds.
 - a. The Budget Committee does not reimburse student organizations and clubs who spend more than they are allocated by the Budget Committee or have in their self-generated treasury.
 - b. If a club or organization is in debt, the Student Activities Fee cannot be directly allocated to alleviate this deficit.
 - i. Clubs can submit appeals for fundraising supplies in order to raise self-generated funding. This is limited by the \$100 fundraising cap unless the purpose of the club or organization specifically mentions fundraising. (See “**Fundraising**”).

Guidelines for Funding Related to the Office for Student Involvement

1. **Copy Cards:** All active clubs will automatically receive a \$30 copy card when they submit an on-time Operations Packet. Clubs who submit late Operations Packets may appeal for a Copy Card during the semester. Sanctions do not apply to the \$30 and no backup documentation is needed to receive a Copy Card. The club must appeal to the

committee for all *additional* refills on their copy card. Copy Cards can be signed out of the Office for Student Involvement during regular business hours.

2. **Metro Cards and Security:** Backup documentation is not required to appeal for MetroCards or Security. The two will be funded at a rate set by the Office for Student Involvement as both items are purchased through the office.
3. **Sale of Student Activity Fee Funded Equipment:** Any club or organization that wishes to sell permanent property (e.g. video camera, computer equipment, etc.) that was purchased with Student Activity funds must first appeal to the committee for approval. After the sale of such equipment, the club must submit an appeal to the Budget Committee to access the funding from the sale. The appeal must include with an explanation of how they will use the funding with the proper backup documentation.
4. **Film Rentals:** All film right rentals should be organized through the Office for Student Involvement. Back-up documentation is still required. Please note that for a club to show movies, the club must purchase the rights to the movie, not the movie itself.
5. **Funding Student Travel:** Travel funded by the Students Activities Fee must be sponsored by a recognized student club, organization or department-sponsored group. The reason for travel must be consistent with the purpose and constitution of the student group.
 - a. An itemized budget appeal with proof of price for all expenditures must be submitted to the Budget Committee. The committee may fund conference registration fees, hotel accommodations and travel (including air fare, train and bus tickets). Meal expenses during any point in the trip will not be reimbursed.
 - i. Day Trips
 1. The Committee will not fund meals at any point for a day trip, regardless of length.
 - ii. Overnight Trips
 1. Number of Participants: The Budget Committee may fund no fewer than two (one student and one chaperone) and no greater than five (four students & one chaperone) conference participants for any non-local conference. If a group wants to send additional conference participants, the group must offset the costs with self-generated funds.
 - a. At the discretion of the Committee, exceptions may be granted to clubs/organizations functioning as a team recognized by Fordham University, for which a conference requires the participation from the entire group and is a culmination of work towards a common goal, fitting within the organization's mission and scope.
 2. Housing Accommodations: Participants must be housed in single-sex accommodations. Chaperones will be housed in their own room. When deciding the number of rooms/accommodations needed, clubs must factor this into their requested budget.

Guidelines Related to the Procedures of the Budget Committee

1. **Meeting Times of the Budget Committee:** The committee meets every Wednesday. Budget appeals, date changes and reallocation requests must be submitted prior to 5pm the Tuesday before the Budget Committee's meeting. If the appeal is submitted to OrgSync after 5pm on Tuesday, it will not be considered by the Committee until the following Wednesday.
2. **Budget Day:** Each semester on Budget Day, the majority of the Student Activities Fee is allocated for the subsequent semester. In order to receive funding, clubs must submit a budget packet which outlines their projected expenditures for the following semester. This packet must include all relevant information and backup documentation described above (See **Required Information and Statements to be Eligible to Receive Funding**).

- a. **Budget Packets:** In order to be eligible for funding, clubs must submit an Operations Packet by the set deadline provided by the Operations Committee. Any club submitting a late or incomplete Operations Packet or Budget Packet will be subject to sanctioning.
 - i. Budget Packets are an accumulation of various new budget appeals submitted in advance for the following semester.
 - ii. Any sanctions pertaining to Operations Packets will be sent to the Budget Committee from the Operations Committee. These sanctions will be applied to Budget Packets on Budget Day and new budget appeals throughout the semester.
 - iii. Late Budget Packets will be sanctioned 5% from the time when the Budget Portal closes to the day before Preliminary Budget Review Day, at which point in time no further Budget Packets will be accepted. Sanctions from the Budget Committee are only applied on Budget Day.

Precedents

The Budget Committee holds certain precedents, in an attempt to look at all appeals in a consistent manner. In rare instances, appeals from clubs may fall into grey areas not specifically covered by the Student Activities Budget Committee Guidelines. In these circumstances, the committee holds the right to make opinions on appeals based on their knowledge as committee members in conjunction with the guidelines. Setting precedents is something to be taken very seriously and are created at the discretion of the committee pending extensive discussion. The committee upholds precedents similar to guidelines, however, due to the fact that the members and opinions of the committee may change, precedents may change from semester to semester.

Block Funded Clubs and Organizations

The term “Block Funded” refers to a funding classification of clubs and organizations in the Fordham Community who apply for a predetermined lump sum allocation on Budget Day. This sum is allocated to the club given that it has properly prepared the Operations Packet and Budget Packet in addition to maintaining good financial standing with the Office for Student Involvement. A block of funding is assigned only to clubs whom the Committee finds to demonstrate responsible and consistent spending, open and inclusive programming, and the necessity of stable funding that does not expire until the end of semester programming.

Block Funding Status Requirements

Block Funded Budget Day Guidelines

1. A complete Operations Packet must be submitted to the Operations Committee.
 - a. Any incomplete Operations Packets are subject to sanctions from the Operations Committee.
2. For all clubs who receive funding on a block funding basis, the following must be presented in their Budget Packet for Budget Day:
 - a. A projected budget for the upcoming semester
 - i. The projection must outline the club’s intended spending by detailing the use of funding through events, activities, and supplies.
 - ii. The projected budget should be submitted in a spreadsheet format uploaded to OrgSync.
 - iii. No backup documentation is required.
3. Clubs and organizations cannot receive a greater amount of funding on Budget Day than the predetermined block amount, regardless the inclusion of additional standard appeals (with specifications of line-items and backup documentation for all purchases) in the Budget Packet.

4. The club cannot receive less than their block amount unless in case of sanctions (from the Budget, Operations, or House Committees) or the submission of an incomplete Budget Packet.
 - a. An incomplete Budget Packet will result in receiving no funding from the Budget Committee.
 - i. Ad-Hoc Appeals will be accepted through the semester (See “**Additional Request Requirements**”).
 - ii. If a Budget Packet is submitted and considered completed but the block of funding requested by the club or organization is lower than the predetermined block amount, the lesser amount will be granted.
 1. This allocation of a smaller block of funding applies only to the Budget Period being address on the occurring Budget Day. The following semester the organization may request their full original predetermined block amount.

Guidelines for Additional Funding Requests

1. Additional funding for a single semester may be requested by Block Funded organizations in the form of Semester Ad-Hoc Appeals.
 - a. A Semester Ad-Hoc Appeal is a standard budget appeal with expected attendance, date, backup documentation, etc. (See “**Guidelines of the Budget Committee**” within the Standard Funded Clubs and Organizations section for more information).
 - i. The appeal must include a detailed letter to the Vice President of Finance and the Budget Committee explaining why the block amount is not sufficient.
 1. This must be saved in a PDF format and uploaded to OrgSync along with the backup documentation for the standard appeal.
 - ii. The Semester Ad-Hoc Appeal will be reviewed in the same manner as a standard funded appeal and must follow all the corresponding guidelines.
2. Permanently Increasing Block Funded Amount
 - a. A request to permanently increase the block funded amount will include written documents submitted to the VP of Finance and the Budget Committee and an in person presentation to the Budget Committee. In order to be considered by the committee for additional block funds, the club or organization must demonstrate responsible allocations of their funds.
 - i. The written request must include:
 1. A formal letter sent to the VP of Finance a week prior to the anticipated presentation date.
 2. A detailed summary and explanation describing why the current block amount is no longer sufficient.
 - ii. The in person presentation must include:
 1. Attendance and commentary from at least two members of the executive board of the club or organization.
 2. An overview of the submitted letter.
 3. Previously submitted Budget Packets (from the previous two semester) and a new budget projection.
 4. Thorough backup documentation and or an explanation of increased spending (i.e. inflation) for the additional funds necessary.
 - b. This request must be submitted and the presentation take place before the Budget Day on which it will take effect.
 - i. This type of appeal can never be viewed as an element of a Budget Day Packet, it must be a separate request.

- ii. Any additional funds added to the block amount may be requested from the club or organization for the subsequent Budget Day.
3. If a Block Funded club would like to permanently reduce their block size, the Treasurer and President should reach out to the Vice President of Finance with a formal letter to coordinate.

Achieving Block Funding Status

Block Funding is intended for clubs who spend a relatively consistent amount each semester and have proven to be responsible with their allocated funding. In order to be considered by the committee for block funding, a club must appeal to the budget committee with the following documentation:

- a. Four semesters of consecutive and consistent budgets from the most recent four semesters tracked by the **designated treasurer(s)**.
 - i. These documents should outline requested, approved, and allocated funding.
- b. Detailed letter explaining why Block Funded Status is necessary for the organization and how it would improve the budgeting process for the Budget Committee and the organization.
- c. A projected budget for next semester with backup documentation for all elements.
- d. Presentation to the Budget Committee and the VP of Finance by at least two executive board members.

It is the responsibility of the club to put together a packet containing the aforementioned information, however any supplemental information is more than welcomed. It is at the discretion of the Budget Committee to determine if the information provided is sufficient, if the club or organization should receive funding on a block-funded basis, and how much funding should be allocated per semester to the club or organization. Following a review of the application, the committee then makes a recommendation to the Student Life Council on block funding status. If approved, block funding will begin on the Budget Day after the approval.

Permanent Allocation of the Budget Committee - Campus Activities Board

The term “permanent allocation” refers to a funding classification of one programming organization in the Fordham Community, Campus Activities Board (CAB). CAB is neither a standard nor block funded club or organization; it is allocated funding on a permanent allocation basis. This designation is determined by the unique nature of programming which CAB provides the Fordham University community, separate from any other organization within the community. It is not required for CAB to submit either a Budget or Operations Packet. Additionally, Budget and Operations Sanctions will not be applied to CAB’s funding. As a permanent allocation, CAB’s funding is allocated by the Budget Committee and overseen by the student treasurer in collaboration with the Office for Student Involvement and the Budget Committee.

Permanent Allocation Status Requirements

1. As a student-run organization, CAB is required to have a student treasurer. Though there may be some overlap of duties with the Office for Student Involvement, this position is responsible for overseeing the spending of the permanent allocation.
2. CAB is responsible for writing a brief budget report regarding the organization's spending and giving a small presentation to the Budget Committee. These components of the permanent allocation request must be submitted and presented to the Budget Committee within the first two weeks of the Budget Packet Season each semester. The formal approval of the permanent allocation will occur through OrgSync after Budget Day.

- a. The requirements for the report and presentation (to be presented to the Budget Committee by two CAB E-Board Members):
 - i. A statement regarding the organization's spending of the allocated funds, including planned improvements for the following semester.
 - ii. A breakdown of the general distribution of the permanent allocation to the various committees in a spreadsheet format.
3. In the event of CAB wanting to increase their permanent allocation, a statement of intent should be made during the permanent allocation report, indicating where the funding is needed (specific committees should be mentioned as well as for what events) and a short explanation as to why additional funds are necessary.
 - a. The Budget Committee will have a period to deliberate the request and in the case of approval they will notify CAB the week before Budget Day and the additional funds will be included in the permanent allocation for the immediately following Budget Day.