



Budget and Finance Committee Request Guide and Policy Booklet

**Policies and information regarding requests from the General Contingency
Fund of the Student Activities Trust Fund – Fiscal Year 2011**

Undergraduate Student Government University of Massachusetts Boston

This policy booklet details the policies and procedures of the Budget and Finance committee of the Undergraduate Student Government for Fiscal Year 2011. Any information not covered in this booklet may be covered by the governing documents of the USG or by University Policy. Any individual policy or rule of this book may not be suspended for any period of time. Amendments or suspension of the policies outlined in this booklet must be submitted to the Budget and Finance chairman no later than four (4) weeks prior to the meeting which the motion would appear at. Approval of this booklet is considered a committee action and shall not go before the Student Senate. This motion supersedes any prior policies of the Budget and Finance committee voted upon in committee. Any prior policies not detailed in this manual voted upon by the committee are suspended as of the passage of this manual. This manual shall be made available to the University Community by use of electronic and physical means. The General Request Cover sheet shall ask for a requestor signature to verify that they have read and agree to all material presented in this booklet. No more than 60% of the initial GCF may be allocated during the fall semester of that fiscal year.

3 – Introduction

3 – Guidelines

9 – Budget Request Process

10 – Additional Information

11 – Tips

Introduction

■ Student Activities Trust Fund

The Student Activities Trust Fund (SATF) is overseen by the Undergraduate Student Government under the Office of Student Activities and Leadership, a division of the Office of the Vice Chancellor of Student Affairs. The SATF is made up of the funds collected under the Student Activities Fee, a mandatory student fee. This money funds various student activities and initiatives on campus, such as the Student Arts and Events Council, all student-run organizations and student centers, the student-run Harbor Art Gallery, the Office of Student Activities and Leadership and the operations of the Undergraduate Student Government.

■ General Contingency Fund

The General Contingency Fund (GCF) is a portion of the SATF devoted to funding new student initiatives and programming that does not fall under other SATF jurisdictions. This includes special on and off campus events, as well as pilot programs and new initiatives. This fund is handled by the Budget and Finance Committee of the Undergraduate Student Senate, the legislative body of the Undergraduate Student Government. This money is meant to be supplementary and in tandem with other fundraising efforts, as it is fairly limited.

Guidelines

■ General Guidelines

○ Eligibility

- All requestors must be either undergraduate students at the University of Massachusetts Boston, or an organization on campus with delegated space on campus, or a department or office of the University.

○ **Funding Guidelines**

- **Funds must be used in the same fiscal year they are requested.**
- **Funding is first-come, first-serve.**
- **There is no appeals process. Requestors unhappy with their funding decision may submit their proposal again, so long as all guidelines are once again met.**
- **No retroactive funding.**
- **All requested funds and transactions must follow all Budget and Finance policy, Office of Student Activities and Leadership policy, Office of the Vice Chancellor for Student Affairs policy, University of Massachusetts policy and state purchasing laws and policy.**
- **Upon approval of funding by the Student Senate, funding is still not guaranteed. We may be unable to help due to policy/legal limitations or logistical challenges, including, but not limited to, purchase order deadlines, vendor limitations or credit limits.**
- **Once an event has happened, the requestor is required to attend a meeting of the Budget and Finance committee within four (4) weeks to review the trip and the funds used. Failure to do so will result in denial of future requests.**
- **To be seen by the Budget and Finance committee at a regularly scheduled meeting, a full General Request Cover Sheet and either an**

on-campus or off-campus request form must be submitted to the chair of the committee no later than 5:00pm of the Thursday prior to that meeting. This deadline may be extended no later than 5:00pm of the Friday prior at the discretion of the chair.

- **If a special emergency meeting of the Budget and Finance committee is called to hear proposals, any proposals seen at that meeting must have been submitted no later than 5:00pm of the 4th business day prior to that meeting. Proposals must be available to Budget and Finance committee members no less than 2 business days prior to that meeting.**
- **Budget and Finance Committee members either attending an off-campus event or assisting in the organization of any event must abstain from voting on the proposal.**

■ On-Campus Request Guidelines

- **Funding requests for on-campus events must be turned in no later than four (4) weeks prior to the date of the event. This deadline can only be suspended at the discretion of the Budget and Finance chair for compelling circumstances outside of the requestor's control. The Budget and Finance chair is under no obligation to extend this deadline if he**

or she does not see it as fit and fair.

- **For food-related purchases, if the on-campus budget request requests funds for a food service vendor other than the contracted University vendor, they must provide evidence that there is substantial savings to be had by using an outside vendor OR that the contracted University vendor does not offer the specific items appropriate for the event. “Substantial savings” will be assessed by the Budget and Finance committee on a case-by-case basis. The 9% off-campus catering charge is to be covered by the off-campus vendor.**
- **No equipment rentals will be funded if there is a reasonable alternative available from the Campus Center. “Reasonable alternative” will be assessed by the Budget and Finance Committee on a case-by-case basis.**
- **No more than 50% of lodging or travel will be covered for guest speakers, except in the case of a University one-day parking pass. No food costs will be covered for guest speakers. No more than \$1500 shall be covered for a guest speaker’s fee.**
- **Registered Student Organizations may not request funds for on-campus events.**

■ **Off-Campus Request Guidelines**

- **Funding requests for on-campus events must be turned in no later than six (6) weeks prior to the date of the event. This deadline shall not be**

suspended for any reason.

- **No more than 65% of travel or lodging costs may be covered. No food costs may be covered. No advisor costs may be covered.**
- **When requesting money for travel, requestors must demonstrate research of at least three (3) modes of transportation. The method chosen must be the least expensive, unless the requestor can demonstrate a compelling reason that the least expensive mode of transportation is not feasible, either due to essential amenities, physical handicap with proper documentation, or a conflict of dates. If less than 40% of attendees cannot use the least expensive mode of transportation due to documented physical handicap, the Budget and Finance committee may request that accommodations differ between those demonstrating a handicap and those who are not.**
- **When requesting money for lodging, requestors must demonstrate research of at least three (3) lodging options. The method chosen must be the least expensive, unless the requestor can demonstrate a compelling reason that the least expensive lodging is not feasible, either due to essential amenities, physical handicap with proper documentation, or a conflict of dates. If less than 40% of attendees cannot attend the least expensive lodging due to documented physical handicap, the Budget and Finance committee may request that accommodations differ between those demonstrating a handicap and**

those who are not.

- **No more than \$325 may be covered per student attendee.**
- **No individual student may attend more than one (1) trip utilizing GCF funds per academic year. No individual student may attend more than three (3) trips utilizing GCF funds during their time at UMass Boston. Requestors are required to be aware of this rule and properly collaborate with all attendees to comply. Failure to comply will result in the requestor and/or requesting organization being unable to request funds from the GCF in the future, unless it is violated by the Office of Student Leadership and Community Engagement. The Office of Student Leadership and Community Engagement is exempt from this punitive measure.**
- **Requestors must present at least two (2) cosponsors before being seen by the Budget and Finance committee for GCF funding. A cosponsor shall be considered an entity other than an attendee contributing funding of at least \$100 to the trip.**
- **No reimbursement is available for attendees who have reserved their own hotel room or paid their own conference fees or have taken part in any advance purchasing.**

Budget Request Process

- **Submission (4-10 weeks prior)**

- Requestor submits completed proposal to Budget and Finance committee chair. If the requestor has any issues with the forms or regulations, they may contact the committee by emailing BF@UMBgov.com or they may visit the Senate office during scheduled office hours. These hours are available at www.umbgov.com.
- **Committee Review (Regularly Scheduled Meeting)**
 - The completed proposal is then seen by the Budget and Finance. The requestor shall be notified of the time and location of this meeting by the Budget and Finance chairman using the contact information listed on the General Request Cover Sheet. The committee then reviews the proposal to make sure it complies with all relevant policies. The committee then shall review the proposal based on various criteria of merit, such as cost efficiency, impact on campus, and other criteria. After calling a closed session to discuss the motion, the committee may then hold a vote. It is also possible the committee may postpone the proposal, to finish review at a later date. This could be due to incomplete information or other factors. In the event that there are not enough Budget and Finance members present to do proper business, the proposal will appear under Old Business at the next meeting.
- **Senate Review (Regularly Scheduled Meeting)**
 - Once a proposal is accepted by the Budget and Finance committee, it goes before the entire Student

Senate for a final vote. The proposal then goes to the President of the Undergraduate Student Government for signatory approval.

■ **Processing of payments**

- **Once a proposal is accepted by the Undergraduate Student Government, the funds are cleared for use. The Budget and Finance chair shall work with the requestor to initiate all purchases or orders required for the proposal.**

Additional Information

- **BoT T92-031 requires that all purchases in excess of \$5,000 be put out to bid. Any services in excess of that number cannot be approved without going through that process. Contact the Budget and Finance chair for more information.**
- **Purchases may be made by University credit card up to \$2,500. This method may not always be available due to additional limitations, so it is very common to have to pay for services via purchase order. To issue a purchase order or check to a company or individual, they must be added as a vendor in the UMass Boston system. They are required to fill out an MW-9 form and a Vendor Addition form, which can be found at <http://bit.ly/br0XV4>**
- **It can take up to 4 weeks to add a vendor to the purchasing system and an additional 4 weeks for a purchase order to process. Be aware of these limitations when submitting a request. The Budget and Finance**

- Committee, USG, Office of Student Activities and Leadership, Office of the Vice Chancellor for Student Affairs, the University of Massachusetts Boston, the University of Massachusetts and the Commonwealth of Massachusetts shall not be held responsible for complications resulting from these limitations or any other logistical limitations of payment or other services.**
- **Approval from the Student Senate is a statement of support rather than a guarantee. Logistical issues can hold up funding that is otherwise approved. The President of the USG also has the power to veto proposals approved by the Student Senate. By submitting a proposal to the USG, you accept these limitations.**

Tips for a Successful Proposal

- **Be exact. Provide as much information as possible to ensure transparency and a shorter wait.**
- **Use GCF funds as your last avenue of funding, if possible. There is a great deal of money in the University and the community available to help sponsor trips, events and other initiatives. Talk to academic departments, individual colleges, deans or professors, university departments or relevant community organizations to solicit sponsorship. Generally, the more work that you've demonstrated, the more likely your request is to succeed.**
- **Do not "fluff" or "pad" your proposal. This can be considered insulting and actually hurts your chances of success. The goal of the GCF and the Student Senate is to**

- support student endeavors, not tear them down.**
- **Do not be afraid to ask for help. The Budget and Finance committee has resources to help. Email the committee at bf@UMBgov.com to arrange a meeting.**
 - **Funds are given on a first-come, first-serve basis. Waiting until the last minute to submit a proposal not only makes it more difficult to set up transactions, it makes it less likely that there will be a great deal of money to help fund your endeavor. It is in your best interest to come forward with a complete, detailed proposal well in advance of the event date.**
 - **The argument “our trip/event/program cannot happen without your support, voting no will kill our trip/event/program” is both very common and minimally compelling. The Budget and Finance committee shall base its decisions on the merits of the proposal at hand and the resources they have available, and nothing more.**
- 