STUDENT ALLOCATION TRAINING

SGA BUDGET OVERSIGHT COMMITTEE & OFFICE OF STUDENT ENGAGEMENT

(256) 765-4248
WWW.UNA.EDU/STUDENTS
UNA.PRESENCE.IO
Who is here to help?

• Budget Oversight Committee
  • Meets every Tuesday in the SGA Office inside Student Engagement

• Student Leadership Consultants
  • Available Monday-Friday in the Student Engagement Office

• Mrs. Juliette Butler
  • Does the administrative paperwork to ensure payments for your events
  • You MUST schedule an appointment with her within ONE WEEK after the review of your request, or you will lose the funding
  • In the Student Engagement Office
# Budget Periods

<table>
<thead>
<tr>
<th>Funding Opens</th>
<th>For Activities/Travel Occurring</th>
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<tbody>
<tr>
<td>September 1 - November 10</td>
<td>October 1 - December 5</td>
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<td>November 1 - November 23</td>
<td>January 1 - May 31</td>
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<td>January 6 - March 15</td>
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<td>March 25 – April 19</td>
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<td>March 1 – March 16</td>
<td>June 1 – September 30</td>
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<td>March 25 – April 19</td>
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Funding Process

- Proposals are due via Student Engagement Online (Presence) by **4:30 on Fridays**, no later than FOUR Tuesdays in advance of the event/travel date
  - Must be submitted by students that attend training. NOT faculty or staff members
  - 1-2 student representatives can appear at the Budget Oversight meeting

- Each RSO is **limited to 2 requests per week**.
- Funding limit of $4000 per **EVENT** request
- Funding limit of $1500 per **TRAVEL** request
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**Events:**
- B.O. Meeting 3:30 each Tuesday from 6th to 27th of October 2015.
Funding Eligibility

- RSOs must be in good standing with Student Engagement
  - Must submit RSO Update Forms each semester via Student Engagement Online
  - RSOs must update their Student Engagement Online (Presence) profile by October 1 and February 1
  - Have the president & treasurer (or designee(s)) attend this training workshop

- Any changes in officers must be updated immediately in Student Engagement Online (Presence).
New RSOs

- Must wait one semester before applying for allocation funding.
- May start applying for allocations November 1st BUT the event/travel must be after January 1st.
- Must be in good standing with Student Engagement.
Appeal Process

- If you get denied, you can appeal if:
  - Budget Oversight Committee deviated from written policies
- Submit appeal electronically, via UNA Student Engagement Online, within 5 academic days from date of notification.
- SGA Executive Council will determine if appeal has grounds. If so, SGA Senate will approve or deny appeal.
- *SGA Senate’s decision will be final.*
Areas Available for Funding

• Program Support
  – Ex. Non-alcoholic socials, Speakers, Movie series, etc

• Equipment
  – Equipment RSO Resource Room, Games, etc

• Recreation
  – Intramural fees/Equipment

• Diverse Population and Issues
  – Programming for gender and multicultural issues
Travel

- Conferences are included
- Funding for travel is limited to $1500
- Each RSO is limited to 1 traveling request per academic year.
- Retreats are not funded
- Gas will be reimbursed by itemized receipts for privately owned vehicles only.
Travel

- Student Engagement **CANNOT** directly pay hotels.
- If hotel accommodations are requested and pre-approved, a member of the traveling group will be required to pay for the hotel and may submit receipts for reimbursement up to the pre-approved amount.
- Allocations will only pay for the room and applicable taxes.
- Receipts must be itemized and submitted to Student Engagement within five (5) university business days.
University buses may be used to provide a looping route for any student to travel from campus to a campus-wide event at a local off-campus destination and are considered program support, not travel.
Every event submission must include a copy of a flyer promoting the event.

The flyer must include:
- Name of event
- Date
- Time
- Location
- Statement

“Made Possible by the Student Activity Fee”
T-Shirts & Apparel

- T-shirt designs must be attached to the funding request & approved by committee.
- T-shirts can NOT be purchased just for your group.
  - They have to be related to an event & available to all students.
- We can not fund paraphernalia that is being used for recruiting/marketing purposes.
Prizes

- Should not exceed over $250.
- Giveaways including t-shirts for an event should NOT exceed $750.
- NO gift certificates or gift cards as prizes.
Purchasing Policies

- Approval of your request does not authorize you to make any purchase.

- If you purchase “out of pocket” with the pre-approval from the Office of Student Engagement YOU MUST have documentation and will not be reimbursed for taxes.

- Anything purchased without the written approval from the Office of Student Engagement WILL NOT be reimbursed.

- You must obtain approval 3 weeks prior to your event.
Contracts

- Contracts need to be initiated at least four (4) weeks in advance of the event.
- If you’re planning on buying sodas, they MUST be Coca-Cola products.
- Any event that requires food must be coordinated through UNA Dining.
- UNA Dining requires a purchase order at least two (2) weeks before the event.
Items Not Funded

- Parking or parking passes
- Any programs involving alcohol
- Activities that charge a monetary admission fee
- Travel/events used as recruiting events
- Complete list of approved vendors is on Page 10.
1. Submit request with budget

2. Meet with Juliette Butler within ONE week after committee reviews the request.

3. Submit Evaluation Form within ONE week after event completion.
   - Failure to do so will result in a loss of funding for three calendar months after the evaluation form is submitted.

   **NO REMINDERS WILL BE GIVEN ABOUT LATE EVALUATIONS!**

Organizations that track attendance at the event using the presence Checkpoint App do not have to complete an evaluation form.
If you do not include documentation for an item, IT WILL NOT BE FUNDED. You can NOT appeal if you fail to include it.

➔ The committee is not responsible for searching out your needs looking at web links.

• Screenshots of multiple forms of documentation will have to be compiled into one Word or one PDF document and then uploaded to the online form.
Most Common Mistakes

- Not attaching a proper flyer.
- Not submitting request in the appropriate time.
- Not turning in an event evaluation form.
- Someone who is not eligible submitting the request.
- Requesting allocations for an event that has already been denied.
Reminders

• UNA is tax exempt
  • Only exception is hotel and airline tickets.
• Have any questions?
  • Email: rmatthews@una.edu
  • Or see the Student Leadership Consultants in the Student Engagement Office
• Almost all questions can be answered by reading the Student Allocations Manual.